Brazil Customer Service Management

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

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Customer Service Management

The ServiceNow® Customer Service Management application enables you to provide the service and support that your external customers need. For example, your customers can communicate and receive support through the web, email, chat, telephone, and social media.

Explore

Learn how Customer Service Management can help you with its key features and benefits.

Configure

Plan and customize Customer Service Management to meet your specific needs.

Administer

Manage and customize your Customer Service Management applications.

Integrate

Extend Customer Service Management capabilities by integrating with other applications.

Use

See how agents and managers can use Customer Service Management to create, route, and manage cases.

Analyze

Access preconfigured dashboards with actionable data visualizations to monitor and improve your service.

Reference

Get additional information about Customer Service Management cases, including the lists, forms, rules, components, parameters, roles, and personas.

Allocate

Use workforce optimization to efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

Automate

Use Now Assist for CSM to enhance user productivity and efficiency through conversation and proactive experiences using generative AI.

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Additional resources

- Learn more about what's new and changed, see the Customer Service Management release notes.
- Log in to your ServiceNow® account and find additional information about implementing and deploying Customer Service Management features at Best Practices Library.
- 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 Service Management users at Now Community.

Exploring Customer Service Management

Learn how the Customer Service Management (CSM) application can help your organization resolve customer issues and requests for your customers. By adopting a proactive customer service approach, you can increase your customer satisfaction and retention.

Overview of Customer Service Management

With the Customer Service Management application, you can automate your processes and give your service agents visibility into the customer systems and tools that they need to deliver proactive services to your customers. Key benefits of the Customer Service Management application include:

Connecting your teams to boost efficiency

You can bring your front, middle, and back offices together so that you can proactively address customer issues and enable more self-service through automation.

Establishing real-time visibility into your customers' products and services

Proactively detect and prevent issues by sending preemptive alerts to your affected customers. You can identify and predict trends to drive the actionable improvements and automate the resolutions for the most often recurring problems.

Identifying and assigning your issues directly

You can connect your teams to track issues to a resolution by directly contacting the customer's department and quickly resolving these issues. You can also maintain a record of the known issues so that future customers don't have to experience the same problems.

Whether starting or expanding your implementation of Customer Service Management, learn more about the available features that you can use to improve your customer service experience and to track your cases from start to finish.

Customer Service Management workflow

The following infographic shows a sample Customer Service Management workflow that describes the different stages handled by an agent, from creating a new case to the case completed.

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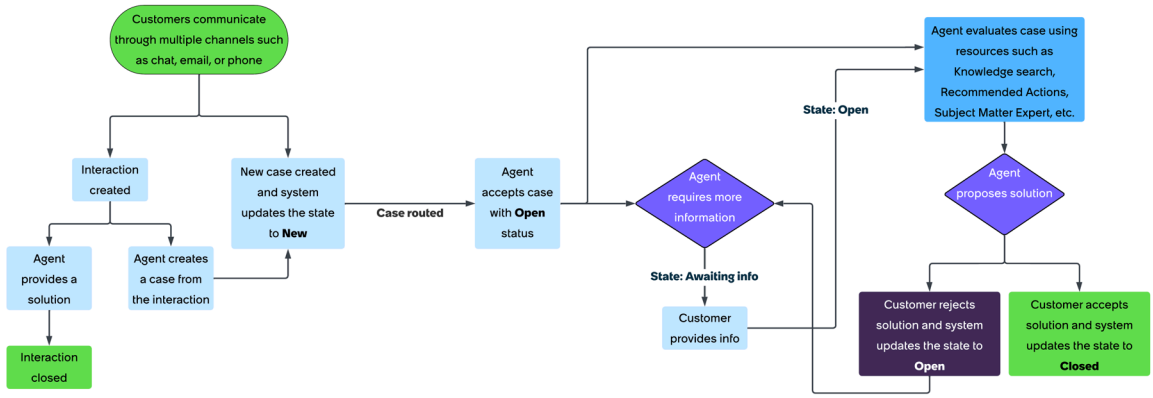
Visual representation of the CSM workflow



Benefits

By utilizing CSM, you can streamline operations throughout the front, middle, and back office, resulting in improved efficiency. Additionally, you can implement self-service features across multiple channels and automate issue resolution. Furthermore, CSM empowers agents with real-time information and intelligent guidance, ultimately enhancing their performance.

Benefits of CSM features

Benefits	Key Features	Role
Learn how to collect, organize, update, and analyze data about your customers.	Customer Data Management	Manager
Drive self-service from a portal that is integrated with knowledge articles, service catalogs, communities, and chatbots.	Self- Service	Administrator
Support your customers across phone, messaging, chat, web, email, in person, and social media.	Omnichannel	Agent
Improve your agent efficiency for faster resolution and a better customer experience.	Agent experience	Manager
Manage the interactions and service level agreements (SLAs), model account relationships, and outsourced service.	Case management	Administrator
Quickly identify the support that a customer needs as well as the opportunities for adoption and selling other add-ons.	Install Base management	Agent
Increase your productivity with automated task creation, triage, and investigation	Intelligence	Manager

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Benefits of CSM features (continued)

Benefits	Key Features	Role
so customers get answers fast. Also, learn how to route issues, recommend solutions, and identify trends.		
Get at-a-glance visibility and a deep understanding of the data and identify areas that impact your processes.	Analytics and Insights	Manager
Instantly monitor and analyze your processes, teams, and performance. Also check your conformance to standards, and learn how you can constantly optimize and improve your processes.	Optimization	Manager
Embed a messenger-like pop up inside any website to interact with ServiceNow features, such as browsing knowledge, creating a case, and interacting with Virtual Agent and manage how your customers use your web applications and services from one central location. You can also configure the behavior and styling of the messenger and deploy the configuration on the websites or mobile sites of your choice.	Engagement Messenger for Customer Service Management	Administrator

Data management for Customer Service Management

Data management refers to the processes and tools used to collect, organize, secure, and use customer-related data effectively so that support teams can deliver better service experiences. You can give your managers and agents a comprehensive view of customer data, including account and contact or consumer details, products and services, assets, contracts, and entitlements.

Overview of data management

In the Customer Service Management application, data forms the backbone of great service. It connects customer, product, service, and team information, giving agents and managers a complete view of every interaction. From customer profiles and product ownership to contracts, entitlements, and installed assets, CSM brings all data together to enable fast resolutions, consistent support, and higher customer satisfaction.

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Customer service value chain

The infographic illustrates the customer service value chain, highlighting how companies deliver products and services to customers through different internal and external entities.

At the core, a company provides both physical and digital products and services. These offerings are delivered through service organizations such as branches, franchises, stores, offices, or even outsourced entities like call centers. Each of these service organizations has employees and staff working in customer-facing or back-office roles. Together, they confirm customers, whether individuals (B2C) or organizations (B2B), receive consistent service.

Some service organizations operate with physical products (for example, point-of-sale systems or demo kiosks), while others rely on digital products and services. Regardless of format, everything within this chain ultimately exists to serve the customers of the company.

How customer data management fits into the value chain

Customer Data Management (CDM) acts as the foundation of this value chain. It confirms that customer details, including accounts, contacts, consumers, and households, are well captured and accurate. With reliable customer data, service organizations can personalize interactions, communicate more effectively, and provide faster resolution of issues.

CDM also enables seamless linkage of customer profiles with products, services, entitlements, and cases, confirming that agents and managers have a 360-degree view of the customer. By maintaining consistent customer data, companies can scale their service operations, deliver positive customer experiences, and gain insights that support upselling, cross-selling, and long-term customer satisfaction.

In short, CDM provides the connective tissue of the customer service value chain. It links the company, its service organizations, staff, and customers together through accurate, actionable information that powers every stage of service delivery.

Key elements of data management

The following key elements form the foundation of effective data management in Customer Service Management:

Customer service business model

Different business models are available to support your goals and business needs in the Customer Service Management application. The business models vary depending on the

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products, services, and support that you provide to your customers. With the correct model for your business, you can answer queries, solve issues, and provide consistent and high-quality service that focuses on increasing your customer satisfaction.

To learn more about the customer service business model, see Customer service business models.

Customer data

Customer data includes information about the customers who are external to your organization, such as names and addresses, telephone numbers, and email addresses. Maintaining accurate customer data enables your agents to communicate with customers quickly and easily.

- B2B: In the business-to-business (B2B) business model, customer data includes details about accounts and contacts.
- B2C: In the business-to-consumer (B2C) business model, it includes details about consumers and households.

To learn more about the customer data, see Customer data.

Product data

Product data includes information about the products and services that your organization provides to its customers. This data can include information about:

- Product models and catalog items
- Assets and sold products
- Installed base items (what the customer owns)
- Installed products

When assisting customers, your agents can use product data to link the correct product to a case, access-related knowledge articles, and review previous resolutions.

To learn more about the product data, see Product data.

Contributor users

Contributor users enable both internal and external users to assist in resolving customer issues and requests. For example, a field technician, partner, or third-party supplier can be added to a case as a contributor.

To learn more about the contributor users, see Contributor users.

Service Model Foundation

Service Model Foundation refers to a set of pre-designed business and technical data frameworks. It helps set up and manage how services are delivered and supported, confirming consistency and efficiency in handling customer and operational requests. It provides a standardized way to configure, monitor, and support service requests, incidents, cases, and workflows across various business locations or service organizations.

To learn how to configure Service Model Foundation, see the Configure Service Model Foundation.

For guidance on using the BLSP portal to add staff to your business location, create cases, work orders, and more, refer to the Using the Business Location Service Portal.

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Internal user data

Internal user data includes the information about the people within your organization, such as managers, agents, and other employees. Internal users can be grouped into teams and assigned roles to manage cases, resolve issues, and interact with customers.

To learn more about the internal user data, see Internal user data.

Business stakeholders for Customer Service Management

Business stakeholders are internal users who directly influence customer service processes. They can create, view, and approve cases and requests, confirming that customer support aligns with business priorities.

To learn more about the business stakeholders, see Business Stakeholder for Customer Service Management.

Customer Access Management

Customer access management (CAM) enables related parties (contacts, consumers, or internal users) in handling cases, sold products, and install bases by providing them with varying levels of access. Additionally, it facilitates tracking and collaboration on specific cases and products for related parties, enabling for the naming of relationships. Related parties associated with a product can not only view the product but also track all of its cases.

For example, a consumer can log a case about a product, while an associated contact at the same household can track and update the case.

To learn more about customer access management, see Configuring customer access management and Using customer access management.

Install Base Management

Install base management captures details of a customer's purchased or installed products. Activating the Customer Install Base Management (com.snc.install_base) plugin enables you to:

- Track products and services at different customer locations
- Enable up-sell and cross-sell opportunities
- Help field technicians service products more effectively
- Resolve issues faster with clear product ownership data

For example, in the banking industry, an install base could include automated teller machines (ATMs). If an ATM at a grocery store fails, a repair request can be created and tracked against the installed base record.

To learn more about install base management, see Configure install base.

Self-service for Customer Service Management

With the Customer Service Management (CSM) application, you can provide service for your customers through web applications that hosts self-service capabilities like knowledge articles, community forums, service catalogs, case management, and chat.

Self-service in CSM empowers customers to resolve issues independently through intuitive digital experiences. It reduces dependency on support agents and improves overall satisfaction. Users can find information, resolve issues, and request assistance through web applications. The platform provides access to knowledge articles, virtual agents, communities, and case

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management. It helps customers get the support they need quickly, reduces the workload on service agents, and improves overall service efficiency.

Self-service in CSM offers the following benefits:

Reduces agent workload

Self-service enables customers to resolve common issues on their own using knowledge articles, guided help, and virtual agents. This reduces the volume of incoming cases and enables support agents to focus on more complex, high-value interactions.

Seamless access to self-service support channels

Customers can access support anytime through an intuitive portal, virtual agent, or knowledge base. Immediate access to information and automated assistance leads to faster resolution times and a more seamless support experience.

Lowers support costs

By shifting routine inquiries and requests to self-service channels, organizations can reduce the demand for live agent support. It decreases operational costs while maintaining high service quality and efficiency.

Provides consistent and accurate answers

Centralized knowledge management ensures that all customers receive standardized and verified information. Knowledge articles and automated workflows deliver accurate, up-to-date solutions, minimizing confusion and repetitive requests.

Enhances overall customer experience

Self-service offers a user-friendly interface that empowers customers to take control of their support journey. By providing multiple, easy-to-use channels and faster resolutions, organizations can strengthen customer trust, loyalty, and engagement.

Web Embeddables

With Web Embeddables you can embed web components into external websites outside the ServiceNow environment. These components enable interaction with the platform through dedicated APIs that support real-time data exchange and provide functionality without requiring users to access the ServiceNow interface. To learn more about Web Embeddables, see Configure Web Embeddables.

Web Embeddables offer the following benefits:

- Seamless user experience: Embedding components onto third-party websites enables you to access them without leaving the current site. You don't need to switch between multiple websites. This maintains a consistent user experience and enhances engagement.
- Configuration: Configure the components to fit the specific needs of your website ensuring that the embedded components synchronize with other components on your website. This flexibility enables you to tailor the user experience according to your business requirements.
- Reusability: The ability to modify the global code and component code enables you to reconfigure the components without developing new functionalities from scratch.
- Low code configuration: Manage updates to data, event handlers, and the presentation of your components with minimal coding. Configure the component code enables you to trigger updates across your component with minimal effort.

Self-service portals

Use the Service Portal web application to create portals that empower your customers to resolve issues and submit cases and requests for themselves. To help direct customers to the right

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portal resources, you can also activate the Virtual Agent application for Customer Service Management.

Self-service portal types

You can configure four types of portals. The Business Portal and Consumer Portal are enhanced portals built on configurable widgets, while the Customer Service Portal and Consumer Service Portal are standard portals. New implementations should use the enhanced portals.

Note: The Business Portal and Consumer Portal plugins are installed automatically when customers install the Customer Service Portal and Consumer Service Portal plugins respectively. For details, see Configure Business and Consumer Portal.

The following table describes the four self-service portals:

Self service portal types

Portal	Description
Customer Service Portal	Supports your business-to-business (B2B) customers
Business Portal	Supports your business-to-business (B2B) customers and is built using configurable widgets. The Business Portal is an enhanced version of the Customer Service Portal.
Consumer Service Portal	Supports your business-to-consumer (B2C) customers
Consumer Portal	Supports your business-to-consumer (B2C) customers and is built using configurable widgets. The Consumer Portal is an enhanced version of the Consumer Service Portal.

All the portals offer the same self-service and Virtual Agent assistance features.

Note: Existing customers can migrate to the Business Portal (B2B) or the Consumer Portal (B2C) to experience enhanced features.

Self-service on portals

You can configure your self-service portals with the following features:

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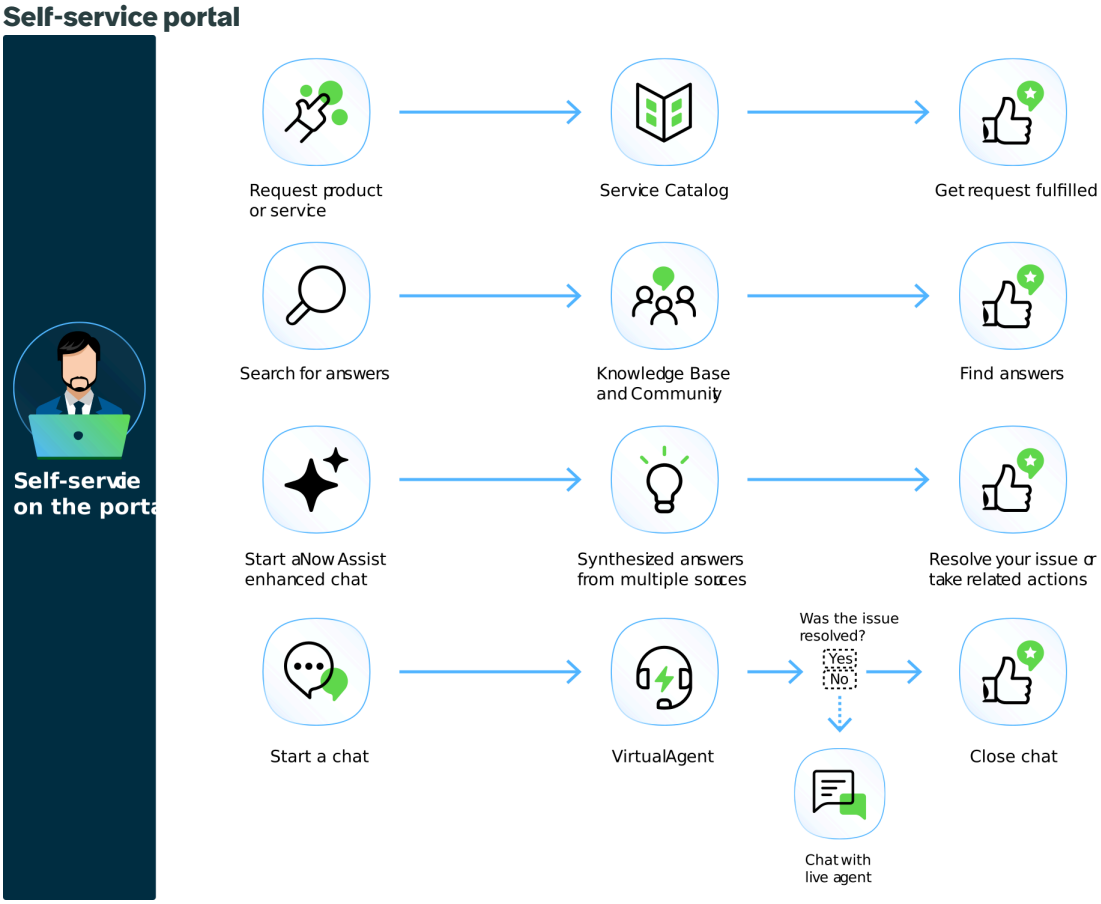

To get started with the portals, see Configure the Customer and Consumer Service Portals and Configure Business and Consumer Portal.

Engagement Messenger

With the Engagement Messenger web application, your customers can easily access the information or services they need from your third-party web applications, even if they're located outside of the ServiceNow environment.

To learn more about Engagement Messenger, see Set up Engagement Messenger.

Service catalog

With the Service Catalog capability, you can create service catalogs where customers can request items, such as service and product offerings. You can enable customers to request items from the portal by associating one or more service catalogs with the portal. Customers can also track the status of open requests from the portal.

To learn more about Service catalog, see Service catalog integration with the Customer and Consumer Service Portals.

Knowledge base

With the Knowledge Management capability, you can create knowledge bases with articles to share information with customers on the portal. Customers can search the knowledge bases for information, such as troubleshooting or task resolutions, to resolve issues and answer questions.

To learn more about searching the Knowledge base, see Search the knowledge base.

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Chat

With the Virtual Agent platform capability, you can design and build automated conversations that help your customers get the help that they need.

As customers answer questions and select options presented by Virtual Agent, they're directed to a self-service resource.

If customers want to chat with an agent, Virtual Agent hands them off to a live agent. To provide this resource, use the Connect Support feature.

To learn more about chat, see Configure chat channel.

Community

With the Communities capability, you can create forums for agents and customers to connect, engage, and collaborate with each other. On the portal, customers can search for community content that could provide the solutions and answers that they need.

To learn more about communities, see Communities.

Omnichannel

Omnichannel routes customer conversations from every channel into one workspace. Agents can see the full interaction history and resolve issues without switching context.

Omnichannel overview

Omnichannel brings together customer communications from email, chat, voice, messaging apps, web and portal, virtual agents, and in-person interactions. It keeps all conversations and context unified in one system as customers switch channels. Agents manage every interaction from a unified workspace to provide consistent service across every channel.

Chat

Chat is available in self-service portals, third-party portals, and mobile apps through Virtual Agent and Engagement Messenger, and conversations carry across every channel.

Email

Track, route, and resolve all emails in ServiceNow. Two workflows are available: Email as Interaction creates an interaction record for agent review before optionally converting to a case. Email to Case automatically creates and populates a case record, with all replies threaded within it. Full conversation history is preserved in both workflows.

Messaging

Omnichannel messaging supports SMS, WhatsApp, Facebook Messenger, LINE, and Apple Messages for Business, so customers can message at their own pace through Virtual Agent or live agents across all channels.

Voice

The Voice framework integrates with certified CCaaS platforms to deliver call features. ServiceNow serves as the unified workspace for organizations that need voice-only or embedded Computer Telephony Integration (CTI).

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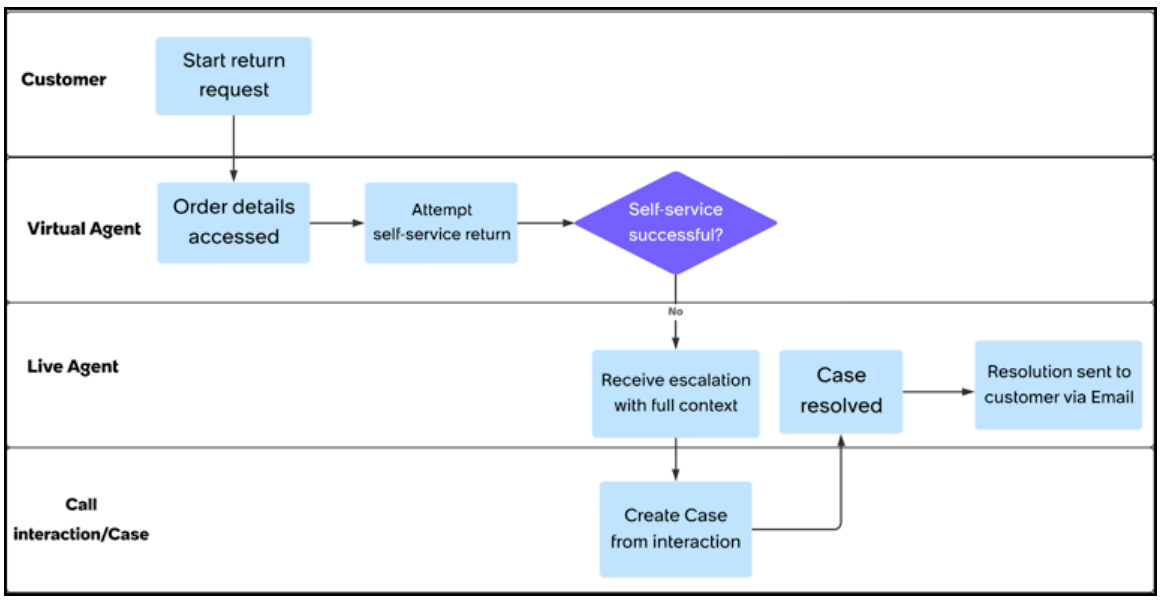
Omnichannel workflow

The following omnichannel workflow example shows how Alex, a customer service manager at a growing retail company, improves support across chat, email, messaging apps, and voice. Customers can start in one channel and continue in another without repeating themselves. A virtual agent collects order and issue details and attempts self-service resolution. When escalation is needed, the conversation moves to a live agent with full context, who creates and resolves the case while keeping the complete interaction history linked. From the unified workspace, Alex's team can view every channel in one place, reduce resolution times, and provide consistent, informed service at each touchpoint.



Channel descriptions

Channel	Role	Description
Chat	Agent	Review incoming chat with full customer history and open cases, resolve the issue, and record a wrap-up code to close the interaction.
	Admin	Set up chat queues, define routing rules to distribute incoming chats by priority or skill, configure Virtual Agent escalation paths, and adjust agent capacity settings to balance workload.
Email	Agent	Review AI-generated email thread summaries and the full activity stream to understand customer issues without reading every message, compose responses, and log outcomes with wrap-up codes.
	Admin	Configure email routing rules to send messages to the correct team, set up shared inboxes for team access, and enable AI summarization to reduce agent review time.
Messaging	Agent	Engage with customers over messaging at a flexible pace and transfer conversations to other agents while preserving the full conversation thread.
	Admin	Connect and manage multiple messaging channels (SMS, WhatsApp, social messaging) from a single ServiceNow interface instead of toggling between separate tools.
Voice	Agent	Handle inbound and outbound calls with customer details and case history displayed before answering, then record a wrap-up code when complete.

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Channel	Role	Description
	Admin	Integrate a CCaaS platform with ServiceNow, define voice routing rules, and manage agent availability, all within ServiceNow rather than switching to a separate platform.

Related topics

Configure omnichannel

Agent experience

Your agents can assist customers through various interaction channels to resolve their issues and manage their cases, delivering high-quality and efficient customer service with Customer Service Management application.

CRM Workspace

Your agents have one desktop for any interaction, including phone, chat, messaging, web forms, and more. Multiple tabs enable agents to efficiently manage several cases at once. Agents have ongoing visibility into the status of issues assigned to middle and back-office teams for resolution. The workspace dynamically displays related contextual information based on the current state. Agents can also set compact mode and dark mode to optimize their experience and productivity.

To learn more about the workspace, see CRM Workspace.

Advanced Work Assignment

Define criteria and routing conditions to automatically assign work items to agents. Assign these items, such as chats or cases, to agents based on their availability, capacity, skills, work history, related tasks, or account team.

To learn more about Advanced Work Assignment, see Set up an AWA service channel for assigning case tasks.

Customer Central

Your agents get a ready-to use centralized view of customer-specific information. Customer Central combines historical activity from self-service (such as knowledge base article views and Virtual Agent interactions) and live interactions (such as chat and SMS). It can be further customized to incorporate data from different sources and use custom components to include customer health scores, churn risk, recent transactions, etc.

To learn more about Customer Central, see Customer Central.

Agent Assist

With agent assist, your agents can handle cases in the workspace and perform an automatic search that shows possible solutions in the following areas:

- Other cases
- Knowledge base articles
- Additional information sources

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Playbooks

Your agents can use playbooks to provide your customers with the step-by-step guidance that they need for resolving specific types of customer service cases. For example, your agents can use these playbooks to help your customers resolve onboarding, complaint, and product support issues.

A playbook enables your agents to manage the life cycle of a case. The workflows that are associated with a specific type of case are detailed in the playbook. The activities that need to be completed to resolve cases of this type are also detailed in the playbook. Playbooks also help your agents to visualize the entire life cycle of a workflow.

To learn more about playbooks, see Playbooks for Customer Service Management.

Mobile

Your agents can manage their customer service cases from a mobile device with the Customer Service Management mobile application. Your agents can stay connected and access information in real time to complete their tasks quickly.

Both your customer service agents and managers can use the Customer Service Management mobile application to review the case details quickly so that they can complete their case tasks. By using a mobile phone with the Customer Service Management application, your agents and customer service managers can perform routine actions and approvals anytime and from anywhere.

To learn more about the Customer Service Management mobile application, see Mobile experience for Customer Service Management.

Workforce Optimization for Customer Service

Manage and maintain the productivity of your workforce from a single application using Workforce Optimization for Customer Service. With this application, you can efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

Watch this short video to see how managers use Workforce Optimization for Customer Service.

https://player.vimeo.com/video/1115317175?h=43792d01cd&badge=0&autopause=0&player_id=0&app_id=58479

The application is available on configurable workspaces. Administrators can configure and customize the workspace using the application capabilities to complete the service objectives efficiently.

Workforce Optimization for Customer Service enables you to:

- Assess real-time operations and performance of teams and agents across different channels and queues.
- Keep track of ongoing work and provide real-time help to team members for a better customer experience.
- Ensure that managers only see the data and views of relevant teams.
- Monitor and measure team performance and provide feedback using assessments.
- Predict and recommend skills for agents.
- Identify opportunities to coach and train your teams.

Manage and monitor the real-time work being done by your agents across different channels and queues. Provide timely help to your team members to solve cases faster and help with complex

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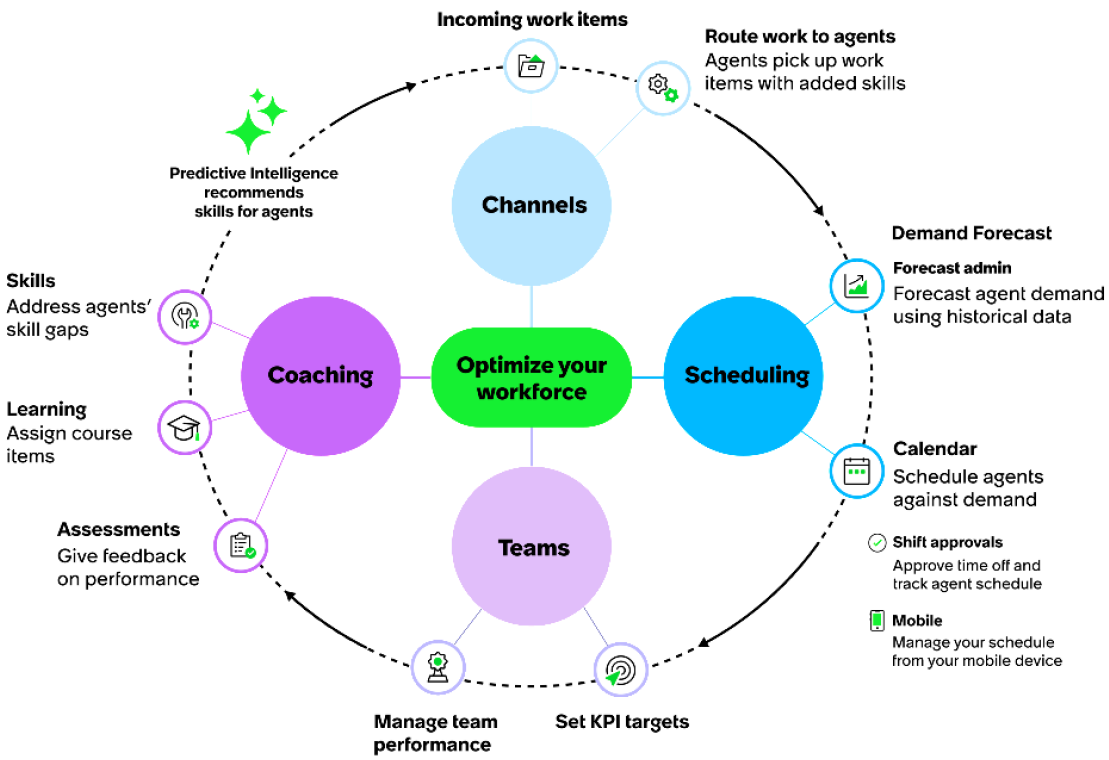
customer issues. Coach your teams so that they gain the skills that let you address the demands from your customers. Efficiently schedule your teams to provide better coverage with integrated channel management.

Manager workflow



As a manager, you can monitor the demand for agents and skills in your organization to resolve issues. Assess agent skills, identify areas where they need improvement, and provide training to enhance their skill set. Track your team's performance and manage the schedule of all agents in your assignment group from a unified location.

As an agent, you can manage your own schedule, access the schedule of your peers, and request time off or shift swaps.

Manager workspace landing page

The landing page offers a real-time view of key performance metrics, team updates, and real-time alerts that improve collaboration. View metrics using various score cards, donuts, gauges, line charts, and bar charts with multiple data sets. For more information, see Manager Workspace landing page.

Channel management

Manage pending work items from customers, manage the daily work routine of agents, and balance the workload between agents adhering to promised SLAs. Automatically route and assign work items to agents based on their availability, capacity, and skills. Monitor your teams in real time and join their chat conversations to help when there is a need.

Using Channel Management, you can also:

- Review the real-time performance of your teams across various channels and queues.
- Review pending work items and manually allocate work items to available agents.

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- Monitor the actual work being performed by your team members.
- Monitor the status of the queues.
- Track and change the real-time presence and capacity utilization of your team members.

For more information, see Channel Management in Workforce Optimization for Customer Service.

Scheduling

Manage the scheduling for your organization from a central location. Create shift plans and schedule plans, assign agents to shifts, and publish the schedules. Manage teams' approvals, swap agents' shifts, and forecast agent staffing scenarios. Access your team's calendar to see which agents are scheduled for coverage and which agents have taken time off.

Using Scheduling, you can also:

- Assign agents to shifts.
- Define break time.
- Preview and publish team schedule.
- Approve agent time-off or shift-swap requests.
- Create on-call shifts and assign primary, secondary rotation groups to handle escalation scenarios.

For more information, see Scheduling in Workforce Optimization for Customer Service.

Schedule Adherence

Access your team's calendar to see which agents adhered to their planned schedules and make timely decisions to increase your team's performance by setting expected adherence targets.

Using Schedule Adherence, you can also:

- Configure and adjust the schedule adherence and conformance formulas and properties so that you can customize them for your organization.
- Access the schedule of all of your teams from one location and gain insights on whether your team is complying with published schedules.
- Analyze the historical time attendance of your team members.
- View planned versus actual historical data for your team and individual agents.

For more information, see Schedule Adherence in Workforce Optimization for Customer Service

Demand Forecasting

Forecast the demand for teams and predict resources based on historical data.

Using Demand Forecasting, you can also:

- View the agent staffing forecast at 15, 30, and 60-minute intervals on the team calendar.
- Adjust and prioritize schedules, tasks, breaks, and meetings for agents without impacting service objectives.
- Use historical data to forecast contact volumes (cases and interactions) at 15-minute intervals.

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For more information, see Demand Forecast in Workforce Optimization for Customer Service.

Teams

Monitor performance trends for your teams using Key Performance Indicator (KPI) groups. Create a set of KPIs and apply them to all groups within a team and assess team performance from one location.

Using Teams, you can also:

- Identify all the teams that you manage as well as the ones you have visibility into.
- Analyze the KPIs that are crucial for your team.
- Drill into agents within each team and monitor their performance.
- Access each agent's profile to view details such as their manager, peers, and assignment groups.
- Drill down into each agent's skills or suggest them for coaching.

For more information, see Teams in Workforce Optimization for Customer Service.

Coaching and skills assessment

Enhance the quality of work done by your agents using Coaching. Assess agent skills and recommend the skills that they require to resolve issues. Identify coaching opportunities based on the recommendations, set coaching plans to improve their skills, and train agents to acquire those skills.

Using Coaching, you can also:

- Automate the scoring, grading, and assessment of agent skills.
- Use coaching opportunities to create assessments.
- Track training assigned to agents based on their assessments.
- Analyze the skill gap and recommend training.
- Assign courses to agents from third-party learning management systems (LMS), such as Udemy, Pluralsight, and Cornerstone OnDemand.

For more information, see: Coaching in Workforce Optimization for Customer Service.

Related topics

Optimize workforce operations

Workforce Optimization for Customer Service

Case management for Customer Service Management

Manage customer requests and issues by creating cases, routing cases to agents and groups, and working toward resolution. With case management, you can provide your agents with the tools they need to evaluate cases, communicate with customers, answer questions, and resolve issues.

Getting to know the case management process

Case management refers to the business processes and activities designed to evaluate and address customer issues and requests while managing the overall customer experience through effective communication. Case management enables you to engage with customers, categorize

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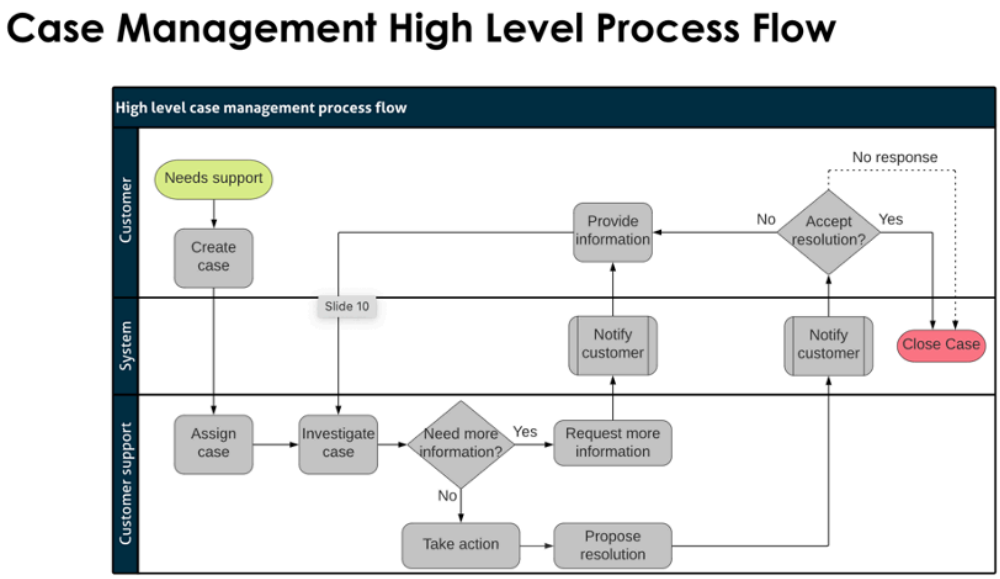
and route cases, assign work to agents, and manage cases through resolution and reporting. Case management starts with case creation as customers reach out through a number of communication channels including email, phone, and chat.

The following diagram shows the case management process.

High-level process flow for the case management process



Use the following features with the Customer Service Management application to manage the cases for your customers:

- Case workflows
- Case types
- Service definitions
- Playbooks
- Major issue management
- Customer project management

Case workflows

A case workflow is a series of steps and tasks that are involved in closing a case. By using a case workflow, you can automate systems to simplify your processes, track task completion, and accelerate case resolution.

To learn more about case workflows, see Configure proactive case flows.

Case types

A case type is a collection of data and processes that are needed to resolve a specific type of issue. For example, case types are needed when a company has different processes for supporting customers across multiple departments, business units, or products. By using a case type, you can separate these processes through case applications that support each process.

To learn more about case types, see Customer Service Case Types.

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Service definitions

A service definition refers to a specific type of service request that your agents can offer to customers for a case type. Service definitions establish a connection between the products, services, and case types so agents and customers can quickly access the relevant case types by the customer or product.

To learn more about the service definitions, see Service definitions.

Playbooks

Playbooks provide agents with a visual guide, including step-by-step guidance for the various tasks that the agents can use to resolve the specific type of customer service cases. A playbook helps to improve agent productivity and your customer experience by digitizing and automating complex customer service processes.

To learn more about playbooks, see Playbooks for Customer Service Management.

Major issue management

With major issue management, you can efficiently manage your customer communication and resolution process for a major issue that impacts multiple customers. By identifying other affected customers who haven't reported the issue, you can proactively create cases, notify the affected customers, and manage all the issues until resolution.

To learn more about major issue management, see Major issue management overview.

Customer project management

With customer project management, your company can track and manage long-term complex projects, resolve issues, and track the cost of serving customers on complex projects. Customer project management helps your company to improve the customer experience, reduce inbound calls, and lower costs.

To learn more about customer project management, see Integrate with Customer Project Management.

Intelligence

Use the Intelligence solutions for the Customer Service Management application to access machine learning frameworks, search and automation functions, and natural language processing to automate and enhance your agent and customer experience.

Intelligence solutions

Intelligence solutions use artificial intelligence (AI) to support machine learning and natural language understanding (NLU) capabilities.

Artificial intelligence

Several Customer Service Management applications use an artificial intelligence layer as a framework for machine learning models to interpret language and predict the best resolution for cases. Examples include Predictive Intelligence, Task Intelligence, and Document Intelligence. Artificial intelligence is the foundation of machine learning and natural language understanding frameworks.

Machine learning

Machine learning solutions for Customer Service Management help with case creation, case assignment, and case resolution.

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Natural Language Understanding

(Legacy) Natural Language Understanding helps with features such as sentiment analysis, which analyzes customer interactions for positive, negative, or neutral tone. NLU can also interpret customer intent when interacting with a virtual agent to automatically fulfill requests. For example: a customer asks "I need access to the XYZ environment", and NLU interprets "Grant access" as the intent and "XYZ environment" as the entity.

Task Intelligence for Customer Service

The Task Intelligence for Customer Service application offers you several AI capabilities. You can use language detection, record categorization, Sentiment Analysis, and Document Intelligence to automate your routine tasks across a case's life cycle. These capabilities also enable your agents to focus on resolving complex cases.

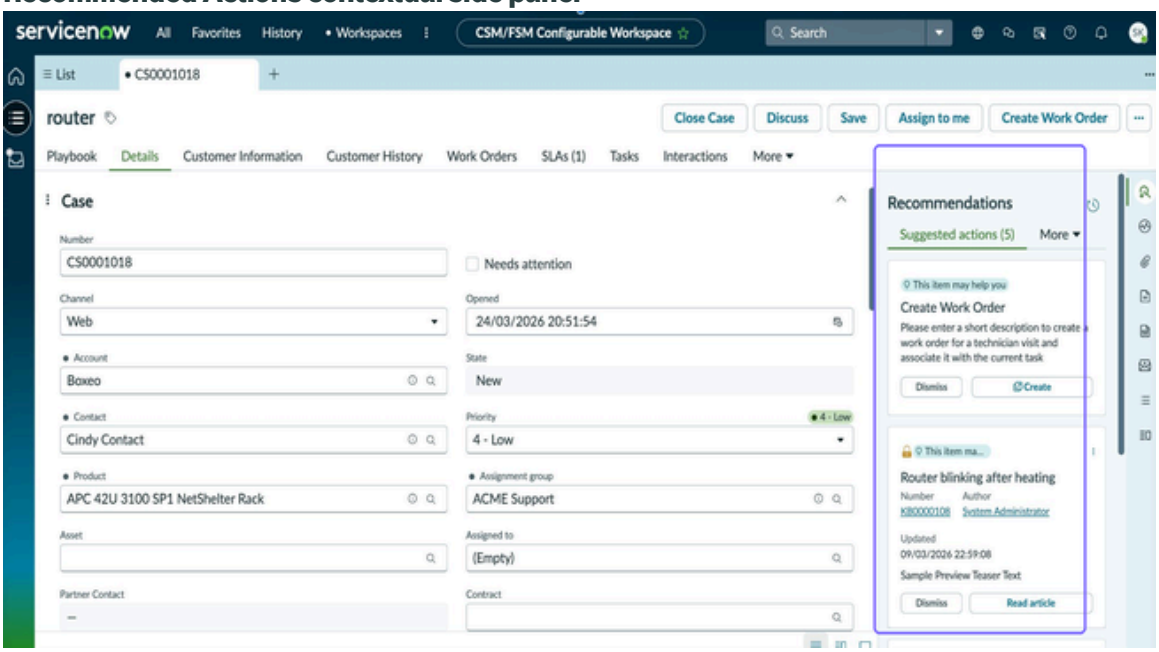
To learn more about Task Intelligence, see Task Intelligence for Customer Service.

Recommended Actions application for Customer Service Management

By using the Recommended Actions application for Customer Service Management, you can configure and display the relevant, recommended actions for your agents. These actions are based on the context of the record. Your agents can quickly follow these recommended actions to assist customers and to resolve issues.

The following example shows the recommended actions on the case record. The panel offers the agent options to assist with a home loan application, such as getting a credit report, determining eligibility, and gathering documents.

Recommended Actions contextual side panel



To learn more about Recommended Actions, see Recommended Actions application.

Predictive Intelligence for case management

You can assist your agents when they are creating cases by limiting the amount of information that they have to enter. For example, an agent only has to enter a short description of the case. Based on the agent's input in the short description field, Predictive Intelligence predicts the category, priority, and assignment group, routing the case to the correct queue.

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To learn more about Predictive Intelligence, see Predictive Intelligence for case management.

Guided Decisions for Customer Service Management

You can resolve complex cases faster and more efficiently by guiding your agents through a structured troubleshooting process.

Guided Decisions is a decision tree authoring and#execution capability in the Customer Service Management application. Use Guided Decisions to guide agents through troubleshooting processes that are based on case context. These processes ask a series of questions and agents provide answers. Based on those answers, agents receive guidance on the next steps to take in the resolution process.

Guided Decisions can help customer service agents by offering step-by-step dynamic guidance as they work to resolve customer issues. This assistance with case resolution can improve agent productivity and customer satisfaction and can help companies in meeting business outcomes. The key benefits include:

- Reduce manual errors by setting up standard processes as decision trees.
- Improve agent productivity by embedding decision trees in recommended actions and playbooks and surfacing relevant actions based on a customer's situation.
- Increase customer satisfaction with consistent agent processes and responses.
- Improve first contact resolution by guiding agents along the optimal path to resolve complex cases.

To learn more about Guided Decisions, see Configuring Guided Decisions.

Analytics and insights

Use the Performance Analytics applications for Customer Service Management to report your customer service performance and effectiveness. You can use the predefined key performance indicators (KPIs) and preconfigured role-based dashboards for monitoring your customer service processes.

Performance Analytics dashboards

The analytics included in the preconfigured Performance Analytics dashboards enable you to align your organizational goals across all roles, from executive to manager to agent.

You can use the dashboards to provide your customer service managers with deep insights into how they can visualize the data over time. They can also analyze the business processes, and identify areas of improvement. For example, the Customer Service Executive dashboard displays profitability data and support trends by month.

To learn more about the Performance Analytics solutions, see Customer Service Platform Analytics Solutions.

Optimization

Optimize your processes by using the Customer Service Management application. You can analyze which processes are relevant to your key performance indicators (KPIs), identify the bottlenecks for your customer service cases, learn how to optimize your workforce, and manage your teams more efficiently.

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Process mining

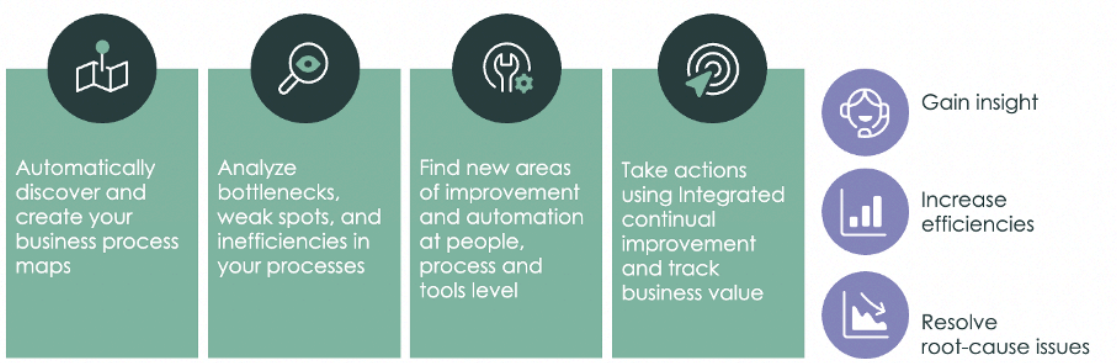
By mining your processes, you can quickly analyze and improve the root cause of the inefficiencies. A process mining content pack has been built exclusively for the Customer Service Management application. This content pack helps you to analyze your cases and create process maps. With a process map, you can review the case records and find the performance issues. After finding some improvement opportunities, you can create initiatives to track the progress to ensure that an issue doesn't happen again in the future. You can also analyze your process maps by using variables like Location, Product, Priority, Category, Resolution code, and Assignment group.

Process mining enables you to do these tasks:

- Visualize your process execution and resolve underlying issues.
- Automatically discover and create process maps for your KPIs and conduct a root cause analysis.
- Use process maps that were built by using audit log data to identify your bottlenecks, redundancies, and opportunities for automation.
- Replace time-consuming manual analysis and costly consultants with automated data-driven process maps.

The following diagram shows the benefits of Process Mining, including creating process maps, analyzing bottlenecks, and finding new areas of improvement and automation.

Process mining steps



Key Features of process mining include:

Dashboard and insights

You can drill down into the process KPIs that are most important to your business. You can get the insights into the process inefficiencies that are discovered by the process model. The top identified case inefficiencies across all organizations are:

- Idling time: The time that it takes for assigned cases to move to Work in progress.
- Resolution rejected: Cases where a solution has been proposed by the agent but for some reason is rejected by the customer.
- Reassignments: Cases where the assignment group change happens at least twice.
- Resolution efficiency: Cases where there's a significant time gap between the Work In Progress and Resolved cases.

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- Assignment efficiency: Cases where the time to assign a case is longer than usual.
- Undesirable transition: Cases that go from Work in progress to Work in progress-awaiting info.

Automated root cause analysis and clustering

You can investigate where and why inefficiencies happen in the process. You can get insights on the leading influencers for the analyzed process steps and discover the hidden connections and influencing factors in the process data.

Multi-dimensional mining

You can link the different related processes to visualize in one graph.

Business process flow creation

You can use the case data in audit trails to perform an in-depth analysis and discover the process insights that can improve your business outcomes.

For more information about enabling the Process Mining content pack, see the following topics:

- Activate Process Mining Content Packs.
- Integrating with Process Mining.

Workforce Optimization

The Workforce Optimization for Customer Service application manages and maintains the productivity of your workforce. With the Workforce Optimization for Customer Service application, you can efficiently route work to your team, manage your team's skills and schedules, and monitor your team's performance.

The Workforce Optimization for Customer Service application is configurable and can be customized to fit your service objectives.

The advantages of Workforce Optimization for Customer Service include:

- Improve the quality, efficiency, and satisfaction of your teams.
- Support skill growth and smart scheduling for your team.
- Get real-time and historical snapshots of your team's performance.
- Onboard, coach, and train workflows to develop and grow your team members.
- Focus on all engagement channels and provide real-time help to your team members so that they can provide a better customer experience.
- Capture all the relevant data and apply these insights and guidance to your team.

To learn more about the Workforce Optimization for Customer Service application, see Workforce Optimization for Customer Service.

Configuring Customer Service Management

Set up the features, components, and integrations that you must provide service and support to your customers.

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Set up your environment	Organize agent workspaces	Enable communication channels
Plan and configure your CSM environment, import foundational data, and set up access management.	Configure intuitive workspaces with advanced routing and management features and case management capabilities.	Set up customer communication channels, including voice, email, web, and messaging.
Implement intelligence	**Set up self-service**	**Extend capabilities**
Set up Intelligence features to automate routine tasks and provide recommended content to agents.	Create self-service portals for customers that are integrated with knowledge, communities, service catalogs, and chatbots.	Add additional features to further extend the capabilities of your Customer Service Management environment.

Configuring Customer Service Management overview

Implementation phase	Description	Example
Set up your environment	Begin your customer journey by setting up your Customer Service Management environment. This setup involves planning and configuring your system with essential components such as data models, customer data, product data, and user management tools. Additionally, import your foundation data, set up access controls, and configure case management tools to go live.	Sarah, an administrator at Company A, has successfully activated Customer Service Management along with all necessary plugins. The next step is to start importing the foundational data, such as accounts, contacts, users, and groups.
Organize agent workspaces	Configuring your agent workspaces is crucial for improving the efficiency and effectiveness of your	Sarah is prepared to organize the agent workspaces. Sarah uses guided setup to implement a workspace

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Configuring Customer Service Management overview (continued)

Implementation phase	Description	Example
	customer service team. To get started, set up and optimize your agent workspaces by configuring interfaces, landing pages, and record pages. This process involves setting up case routing, implementing advanced case management features. It also includes integrating agent tools for smooth case handling and streamlined workflow management.	for Company A's customer service agents. It enables Sarah to configure branding, chat settings, and other necessary elements to enhance agent productivity.
Enable communication channels	To facilitate seamless customer interactions across various platforms, it's essential to set up and configure multiple communication channels. This approach confirms that customers can reach your service through their preferred methods, enhancing their overall experience. Set up and configure a variety of communication channels to facilitate customer interactions. Such methods include voice, email, chat, web, messaging, phone, engagement messenger, and omnichannels.	With the agent workspaces organized, Sarah is prepared to set up communication channels, including chat, email, phone, and social media. Sarah has chosen to use Engagement Messenger to integrate customer support capabilities via chat on Company A's website.
Implement Intelligence	Implementing intelligence features in Customer Service Management helps you achieve a quicker and more personalized customer experience. Set up these features to automate routine tasks and deliver relevant content to you, helping you to focus on more complex case resolutions.	Sarah implements Recommended Actions to guide agents in assisting customers quickly and consistently. Agents can use AI search for fast access to relevant information to resolve customer issues.
Set Up Self-Service	Creating and enabling a self-service portal equips you to resolve issues independently and access	Now it's time to add support for B2C consumers with Customer Service Portals. Customers can book appointments, access

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Configuring Customer Service Management overview (continued)

Implementation phase	Description	Example
	information. Set up self-service portals by integrating features such as knowledge bases, communities, service catalogs, chatbots, walk-up experiences, and appointment booking.	knowledge base articles, or join user communities.
Extend Capabilities	To extend your Customer Service Management environment, integrate additional applications and features. This expansion broadens your system's functionality, enhances process management, and improves support tasks. As a result, you experience more efficient interactions and better overall support.	Sherry, a director at Company A, asks Sarah for tools to analyze agent performance and customer interactions. Sarah begins configuring Performance Analytics for Company A's ServiceNow instance.

Set up your environment

Begin your customer journey by preparing your Customer Service Management environment with data models, customer data, product data, user management, and case management tools to go live.

Getting started	Customer data	User management
Activate Customer Service Management, and import your foundation data.	Configure customer data, such as accounts, contacts, and consumers.	Create and manage data for internal users, such as managers, agents, and support groups.

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Product data	Data models	
Configure product data including product models, sold products, install base items, and installed products.	Create and manage data models for Customer Service Management.	

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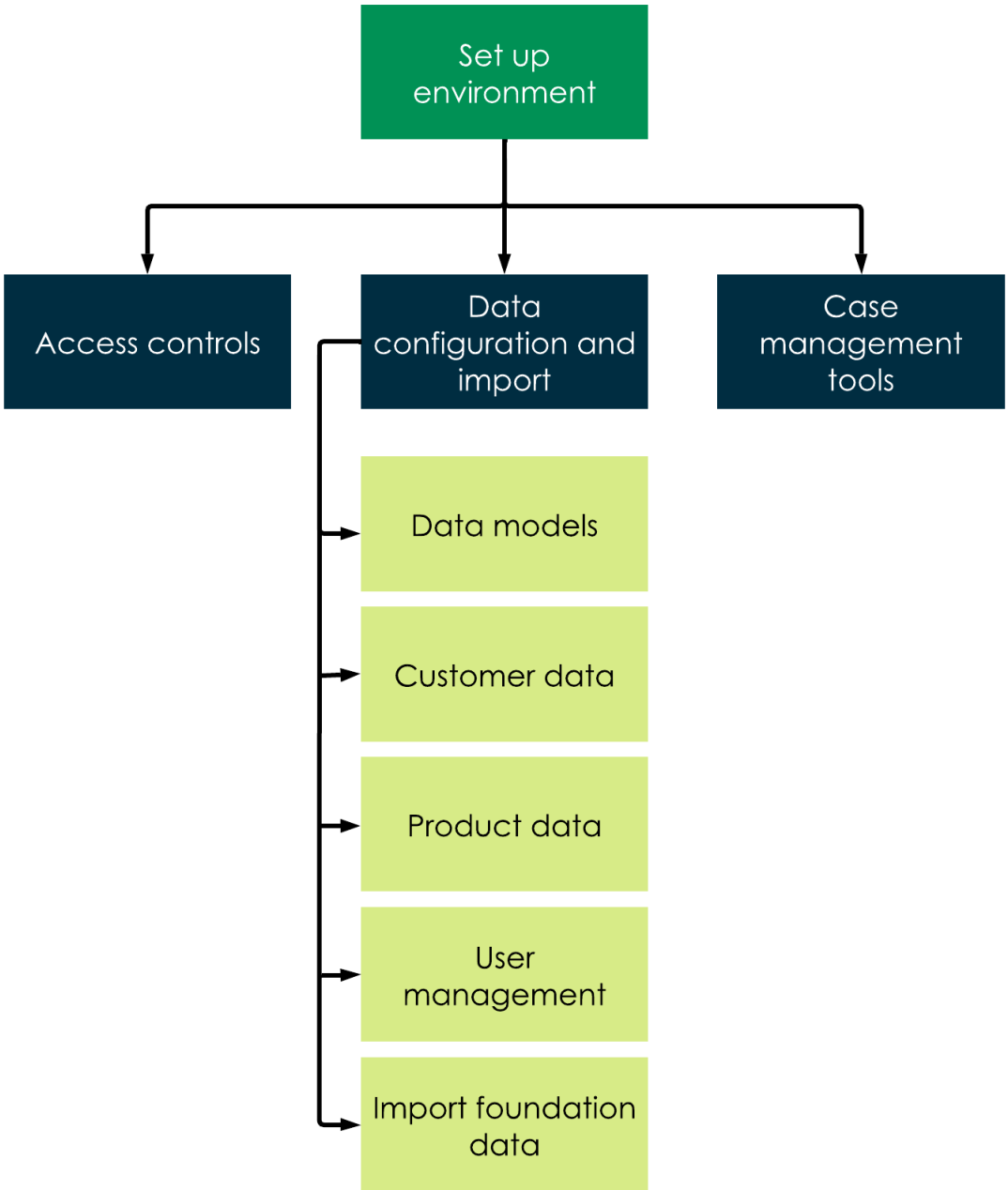
Set up environment overview



Getting started

Start by activating the Customer Service Management plugin and importing your foundation data to establish a solid framework. This approach helps you to plan and install any additional plugins you need, securing a well-integrated and effective system for optimal performance. Activate the CSM plugin and foundation data to establish a robust framework. It facilitates efficient plugin planning and installation, confirming a well-integrated system.

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Customer data

Configure customer data in Customer Service Management, including details about accounts, contacts, and consumers to confirm comprehensive information capture. This setup confirms that all the relevant customer and account information is captured.

User management

Create and manage user data for internal users such as managers, agents, and support groups, as well as external users. Configure their access to features, capabilities, and case data in Customer Service Management features and case data. This setup helps establish relationships that streamline case management and enhance support roles for accounts, leading to better efficiency and effectiveness in handling customer interactions.

Product data

Configure product data to streamline Customer Service Management including product models, sold products, install base items, and installed products. This setup helps you quickly access relevant details, resolve issues more effectively, and improve overall service by providing a clear view of product status and history.

Data models

Create and manage structured and flexible data models in Customer Service Management to meet industry needs, with organized data, accurate interactions, and seamless adaptability.

Getting started with Customer Service Management

Activate the Case Management Core plugin and plan your Customer Service Management implementation by installing additional plugins.

Activating plugins and foundation data

Task	Description
Activate Customer Service Management	As an admin, activate the Case Management Core plugin (com.sn_customerservice). This plugin includes demo data and activate related plugins.
Customer Service properties	Customize settings for several different features, including email communication, asset contact relationships, and the Consumer Service Portal.
Configure foundation data	Import customer information including names, addresses, and phone numbers; accounts, contacts, consumers, users, groups, group members, product models, and assets. Assign roles to groups or to individual users. Create service contracts and entitlements. Create customer relationships, asset relationships, and account teams.

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Activate Customer Service Management

You can activate the Case Management Core (com.sn_customerservice) plugin, if you have the admin role. This plugin includes demo data and activates related plugins if they aren't already active.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Install all Customer Service Management applications

Install all eligible Customer Service Management (CSM) applications from a single ServiceNow Store product. Use this procedure to find and install the CSM apps your organization is entitled to in one step.

Before you begin

Role required: admin

About this task

A ServiceNow Store product groups multiple Store applications into one installable bundle. With a Store product, customers can:

- Install multiple apps in a single select.
- See which apps they're entitled to, based on their licenses.
- Choose which apps to include at install time.

CSM capabilities are delivered through many individual applications. Currently, customers must locate and install each app one at a time through the ServiceNow Store or Application Manager. This creates a fragmented experience that increases the risk of missing apps. Because of the volume of apps, customers also frequently miss newly released CSM applications they're entitled to use.

The Install all CSM Apps Store product consolidates the experience. Customers see every CSM app they qualify for in one list and install them together.

Procedure

1. Log in to your ServiceNow instance.
2. Navigate to **All** > **Application Manager**.

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3. Search for the Install all CSM Apps Store product.
4. Select **Install**.
5. Review the list of eligible apps and select the apps to install.
6. Select **Confirm**.

Customer Service properties

Use system properties to customize the Customer Service Management application.

These properties control settings for several different features, including email communication, asset contact relationships, and the Consumer Service Portal.

To access these properties, navigate to **Customer Service** > **Administration** > **Properties**.

You can also access Customer Service Management properties using the system property [sys_properties] table. Start by entering **sys_properties.list** in the application navigator and pressing **Enter**. You can then filter the properties by application.

Related topics

Properties installed with Customer Service Management

Components installed with additional plugins for Customer Service Management

Configure foundation data

With Customer Service Management, you can import or create customer information including names, addresses, and phone numbers; account details; products and assets; and service contracts. You can also assign roles to users and create customer relationships.

Before you begin

Role required: csm_guided_setup_user

About this task

Foundation data includes the data that you must configure to support your customers, including information about:

- Customers (external users)
- Customer relationships
- Users (internal users such as agents and employees)
- Customer and user roles
- Products and assets
- Service contracts and entitlements

You can import and configure most of this foundation data using the Customer Service Management guided setup. This feature takes you through the entire setup and configuration process.

To create data, such as adding new accounts and contacts, you can use the Customer Service Management application.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.

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The guided setup reopens with a page of different categories of Customer Service Management features that you can configure.

3. In the Foundation Data category, select **Get Started**.

   The Foundation Data page opens with a list of tasks to configure the different types of customer information.

4. To perform a task, select **Configure**.

Foundation Data configuration tasks

Task	Description
Import Accounts	In the business-to-business (B2B) model, an account is a supported external customer. Import and verify existing account data. For more information, see Import accounts and contacts with guided setup. **Note:** After importing customer account data, you must also set the account code system property.
Import Contacts (B2B)	A contact is a user who is an employee of an account. Import and verify existing contact data. For more information, see Import accounts and contacts with guided setup.
Import Consumers (B2C)	A consumer is a customer in the business-to-consumer (B2C) business model. Import and verify existing consumer data. For more information, see Import consumers through guided setup.
Import Users	A user is an individual who can access your instance. Import and verify existing user data. For more information, see Configure users and groups.
Import Groups	A group is a set of users who share a common purpose. Import and verify existing group data. For more information, see Configure users and groups.
Import Group Members	The users associated with a group are listed as group members. Import and verify existing group member data.
Assign Roles	Roles control access to features and capabilities. The Customer Service Management application provides two types of roles: ○ Internal roles for agents and managers ○ External roles for customers, customer partners, and consumers

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Task	Description
	Assign the necessary roles to internal and external users. For more information, see Assign roles to CSM users.
Create Customer Relationships	Create relationships between partners, contacts, and customers to make account and asset management easy and flexible. For more information, see Create customer relationships. You can create the following types of relationships: ○ Bi-directional account relationships ○ Account hierarchy ○ Contact relationships
Import Product Models	A product is a type of good or service that your company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables. For more information, see Import product models with guided setup.
Import Sold Products	Sold products are products and components that have been sold to an account or a consumer. Importing sold products provides an overview of the complete product sold to an account or consumer. For more information, see Import sold products with guided setup.
Create product model and catalog items relationships	Enable self-service for customers to request services on products by creating relationships between product models and catalog items. For more information, see Configure product model and catalog item relationships.
Import Install Base Items	Install base items represent the instances that have been configured for a customer. Each install base item references the configuration item record for the customer. For more information, see Import install base items with guided setup.
Import Installed Products	Installed products create an association between sold products and install base items. Installed products also provide information on the sold products and how they're deployed or installed. For more information, see Import installed products with guided setup.
Import Assets	An asset is a specific product or instance that is supported for a customer. There are different types of assets and Information for

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Task	Description
	each type of asset is stored in a different table. For more information, see Import assets with guided setup.
Create Asset Contact Relationships	Assign assets to the customer contacts who are responsible for managing those assets. If desired, enable a property that limits access to asset information to just the assigned contacts. For more information, see Create asset contact relationships.
Create Service Contracts	A service contract contains information about the type of support that is provided to a customer and can include coverage for specific assets. It can also include multiple service entitlements and service-level agreements (SLAs). For more information, see Create service contracts.
Create Entitlements	An entitlement defines the type of support that a customer receives as well as the supported communication channels. Entitlements are counted and tracked using two types of units: cases and hours. For more information, see Configure entitlements.
Create Account Teams	Account teams are made up of employees who fulfill specific jobs or roles for a particular account. Create these roles, or responsibility definitions, and then assign them to employees and contacts. For more information, see Creating an account team member.

Quick start tests for Customer Service Management

Quick start tests are part of the Automated Test Framework (ATF). Use these tests to validate that the Customer Service Management application still works after you make any configuration change, such as applying an upgrade or developing an application.

A quick start test is a test or test suite installed with the demo data of an application. You can use quick start tests as templates to build your own tests and test suites that ensure successful execution with your instance-specific data.

For more information about using quick start tests, see the following topics:

- Test your apps with the ATF
- Quick start tests
- Getting started with quick start tests

CSM test suites and tests

The CSM test suites and tests are listed in the tables below.

- CSM: Case management test suite
- CSM Configurable Workspace test suite

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- CSM: Case Types - Complaint
- CSM: Case Types - Onboarding
- CSM: Operations Dashboard test suite
- CSM Portal test suite
- Guided Decision - Next Best Action ATF test suite
- TC: Targeted Communications test suite
- CSM Walkup Experience tests

Plugins

All Customer Service Management quick start tests require activating the Customer Service Management Demo Data plugin (com.snc.customerservice.demo). Some quick start tests also require activating the following plugins:

- Business Location (com.snc.business_location)
- Case Playbook for Complaints (sn_complaint)
- Case Playbook for Onboarding (sn_onboarding)
- Consumer Service Portal (com.glide.service-portal.consumer-portal)
- CSM Contributor User (com.snc_csm_contributor_user)
- Customer Proxy Contacts (com.snc.csm_proxy_contacts)
- Customer Household Data Model (com.snc.household)
- Customer Service Management for Orders (com.snc.csm.order)
- Customer Service Portal (com.glide.service-portal.customer-portal)
- Customer Service with Request Management (com.sn_cs_sm_request)
- Customer Service with Service Management (com.sn_cs_sm)
- Guided Decisions Experience (com.snc.guided_decisions_playbook_experience)
- Guided Decision - Next Best Action (com.snc.next_best_action)
- Major Issue Management (com.sn_majorissue_mgt)
- Proactive Customer Service Operations with Event Management (com.snc.proactive_cs_itom)
- Skill Determination (com.snc.skill_determination)
- UX ATF Action (com.glide.ux.atf_action)
- Walk-Up for CSM (com.snc.walkup_for_csm)

CSM: Case Management test suite

Test	Description	Release version
CSM: Create Product Case	Create a case for a product.	Madrid
CSM: Assign Case to an Agent	Create a case and assign it to a customer service agent.	Madrid
CSM: Assign Asset on Case	Assign an asset to a case.	Madrid
CSM: Assign Entitlement	Assign an entitlement to a case.	Madrid

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CSM: Case Management test suite (continued)

Test	Description	Release version
CSM: Escalate an Account	Escalate an account.	Madrid
CSM: Escalate a Case	Escalate a case.	Madrid
CSM: Create Special Handling Notes	Create special handling notes for a case.	Madrid
CSM: Close a Case	Close a case.	Madrid
CSM: Time Recording	Record the time worked on a case.	Madrid
CSM: Create CHG from Case	Create a change record from a case.	Madrid
CSM: Create Incident from Case	Create an incident record from a case.	Madrid
CSM: Create Order Case	Create a case for an order. **Note:** Requires Customer Service Management for Orders.	Madrid
CSM - Create Order Case as Customer from CSM Portal	Create an order case as a customer from the Customer Service Portal. **Note:** Requires the Customer Service Portal. Also requires that the test be run as admin.	Madrid
CSM: Create Problem from Case	Create a problem record from a case.	Madrid
CSM: Create Major Case and its Child Cases	Create a major case and the associated child cases for the customer accounts in the recipient list. **Note:** Requires Major Issue Management.	Orlando
CSM: Agent Creating Request for Customer	As a customer service agent, create a request for a customer. **Note:** Requires Customer Service Request Integration.	Orlando
CSM: Register New Case Type	Register a case type and verify the record is created.	Orlando

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CSM: Case Management test suite (continued)

Test	Description	Release version
CSM - Create Project for an Account	Project Manager creates project for an account. **Note:** Requires Customer Project Management.	Orlando
CSM - Identify Project Contact	Project manager identifies customers to a project. **Note:** Requires Customer Project Management.	Orlando
CSM - Create Case from Project	Create a case from a project.	Orlando
CSM: Advanced Type Skill Determination Rule Test	Create an advanced type skill determination rule. **Note:** Requires Skill Determination.	Orlando
CSM - Create Case from Project Task	Create a case from a project task.	Orlando
CSM: Create Task from Case	Create a case task from a case.	Orlando
CSM: Assign Case Task to Case Task Agent	The customer service agent creates and assigns a case task to a case task agent.	Rome
CSM: Case Task Agent views assigned Case Task	Verifies that the case task agent can view an assigned case task.	Rome
CSM: Case Task Agent Completes Assigned Task	The case task agent completes an assigned case task.	Rome
CSM-Create a case using 'Create a case (POST)' API	Create a case using 'Create a case (POST)' API. **Note:** Requires a user authentication record assigned to the **Basic authentication** field in step 1 of the ATF.	Rome
CSM-Query a case using 'Query a case (GET)' API	Query a case using 'Query a case (GET)' API.	Rome

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires a user authentication record assigned to the **Basic authentication** field in step 1 of the ATF.	
CSM: Address sharing across Accounts	Implement reusable addresses for accounts to support complex customer operations and business models.	Washington DC
CSM: Manage Consumer Profile Locations	Create and manage consumer locations, and map them to consumer profiles.	Washington DC
CSM: OCS Manager creating New OSP	Verify that a new Outsourced Service Provider (OSP) is created by the OCS internal manager. **Note:** Requires Outsourced Customer Service.	Rome
CSM: Case Creation by OCS Agent	Verify that an Outsourced Customer Service agent is able to create a case. **Note:** Requires Outsourced Customer Service.	Rome
CSM - Create Proactive Case by NOC Operator	Verify whether a proactive case is created. **Note:** Requires Proactive Customer Service Operations with Event Management.	New York
CSM - Employee creating case OBO customer	As an employee with the proxy contact role (sn_customerservice_proxy_contact), create a case from the self-service portal on behalf of a customer.	New York

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CSM: Case Management test suite (continued)

Test	Description	Release version
	Note: Requires the Customer Proxy Contacts.	
CSM - Lookup Type Skill Determination Rule Test	Create a lookup type skill determination rule. **Note:** Requires Skill Determination.	New York
CSM - Manager creating request OBO customer from CSM portal	As a user with the case manager role, create a case on behalf of a customer from the Customer Service Portal. **Note:** Requires Customer Service Request Integration.	New York
CSM - Simple Type Skill Determination Rule Test	Create a simple type skill determination rule. **Note:** Requires Skill Determination.	New York
CSM - Project Manager create project task and assign to a customer	Project manager creates project task and assigns to a customer. **Note:** Requires Customer Project Management.	Orlando
CSM - Agent Create Cases from a Project	As a customer service agent, create a case from a project. **Note:** Requires Customer Project Management.	Orlando
CSM - Agent Create Cases from a Project task	As a customer service agent, create a case from a project task. **Note:** Requires Customer Project Management.	Orlando

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CSM: Case Management test suite (continued)

Test	Description	Release version
CSM - Agent Create Change Requests for a project	As a customer service agent, create a change request for a project.	Orlando
CSM - Service Contracts covered under Sold Product	Create sold products and service contracts and associate service contracts to a sold product. Verify the association between the active contracts and the sold product. **Note:** Requires Customer Service Install Base Management.	Orlando
AWA - Create New Service Channel	Create a new service channel in the Advanced Work Assignment application. **Note:** Requires Advanced Work Assignment for CSM.	Orlando
CSM-ITOM - Create Child Cases for Proactive Major Case	Create a child case for a proactive major case using recipient list. **Note:** Requires Proactive Customer Service Operations with Event Management.	Orlando
CSM - Create Outage from Case	Validate if newly created outage is linked to a case.	Paris
CSM: Create Sold Product on Household	Create a sold product on a household and its member. **Note:** Requires Customer Service Install Base Management and Customer Household Data Model with **Load demo data** enabled.	Quebec
CSM: View Health Status of Install Base Item from Account and Case pages	Validates the functionality of the **Refresh Install Base Health** button on the Account and Case record pages.	Quebec

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CSM: Case Management test suite (continued)

Test	Description	Release version
CSM: Report a knowledge gap from a case in Agent Workspace	Verify that a knowledge gap related to a case was reported in Agent Workspace	Rome
CSM-Create a case using 'Create a case (POST)' API	Create a case using 'Create a case (POST)' API. **Note:** Requires a user authentication record assigned to the **Basic authentication** field in step 1 of the ATF.	Rome
CSM-Query a case using 'Query a case (GET)' API	Query a case using 'Query a case (GET)' API. **Note:** Requires a user authentication record assigned to the **Basic authentication** field in step 1 of the ATF.	Rome
CSM: OCS Manager creating New OSP	Verify that a new Outsourced Service Provider (OSP) is created by the OCS internal manager. **Note:** Requires Outsourced Customer Service.	Rome
CSM: Case Creation by OCS Agent	Verify that an Outsourced Customer Service agent is able to create a case. **Note:** Requires Outsourced Customer Service.	Rome
CSM: Manage Consumer Profile Locations	Create and manage consumer locations, and map them to consumer profiles.	Washington DC
CSM: Address sharing across Accounts	Implement reusable addresses for accounts to support complex customer operations and business models.	Washington DC
CSM: Create Case as Location Contributor from BLSP Portal	As a location contributor,create a case from the BLSP portal.	Yokohama

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CSM: Case Management test suite (continued)

Test	Description	Release version
CSM: Create a Business Location And Onboard a Member To It	Verifies the creation of a business location and onboarding a member to it.	Yokohama
CSM: Escalate or de-escalate account workflow	Escalate or de-escalate account workflow	Zurich

CSM Configurable Workspace test suite

Test	Description	Release version
CSM Workspace: Case creation Workflow	Tests the creation of a case record by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Case follow up workflow	Tests the requesting of information from a customer by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Report knowledge gap workflow	Tests the creation of a knowledge feedback task for a case record by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Case resolution workflow	Tests the resolution of a case record by a customer service manager in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Create Incident from Case	Tests the creation of an incident record from a case record by a customer service agent in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Create Problem from Case	Tests the creation of a problem record from a case record by a customer service agent in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Create Normal Change from Case	Tests the creation of a change record from a case record by a customer service agent in CSM/FSM Configurable Workspace.	Xanadu
CSM Workspace: Case creation from All Cases list	Tests the creation of a case from the All cases list by a customer service manager (sn_customerservice_manager)	Yokohama

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CSM Configurable Workspace test suite (continued)

Test	Description	Release version
	in CSM/FSM Configurable Workspace.	
CSM Workspace: Case Creation from My Cases list	Tests the creation of a case from the My Cases list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama
CSM Workspace: Case Creation from My Open cases list	Tests the creation of a case from the My Open list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama
CSM Workspace: Interaction creation from My Interaction list	Tests the creation of an interaction record from the My Interactions list by a customer service manager (sn_customerservice_manager) in CSM/FSM Configurable Workspace.	Yokohama

CSM: Case Types - Complaint

Test	Description	Release version
Create a Complaint Case	Tests that a user can create a case that is of type complaint in the sn_complaint_case table.	Paris
Escalate a Complaint Case	Tests that a user can escalate a case that is of type complaint in the sn_complaint_case table.	Paris

CSM: Case Types - Onboarding

Test	Description	Release version
Create an Onboarding Case	Tests that a user can create a case that is of type onboarding in the sn_onboarding_case table.	Paris
Escalate an Onboarding Case	Tests that a user can escalate a case that is of type onboarding in the sn_onboarding_case table.	Paris

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CSM: Operations Dashboard test suite

Test	Description	Release version
awa_admin_operations_dashboard	Verify whether user with role awa_admin is able to view the Advanced Work Assignment menu under Operations Dashboard and unassigned interactions and unassigned task work items modules.	Orlando
awa_manager_operations_dashboard	Verify whether user with role awa_manager is able to view the Advanced Work Assignment menu under Operations Dashboard and unassigned interactions and unassigned task work items modules.	Orlando

CSM Portal test suite

Test	Description	Release version
CSM - Create Product Case as Customer from CSM Portal	Create a product case as a customer from the Customer Service Portal. **Note:** Requires Customer Service Portal. Also requires that the test be run as admin.	Madrid
CSM - Create Product Case as Partner from CSM Portal	Create a product case as a partner from the Customer Service Portal. **Note:** Requires Customer Service Portal. Also requires that the test be run as admin.	Madrid
CSM - Search on Homepage	Search for information from the Customer Service Portal. The search includes cases, Knowledge articles, and Community threads.	New York
CSM - Update Support Profile	Update a contact's profile from the Customer Service Portal.	New York
CSM - Provide requested info on case	From the Customer Service Portal, the contact can provide information for a case that was requested by the agent.	New York

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CSM Portal test suite (continued)

Test	Description	Release version
CSM - Accept Proposed Solution On Case	Accept a proposed solution for a case from the Customer Service Portal.	New York
CSM - Provide Feedback on Survey	Provide feedback on a survey after a case is closed from the Customer Service Portal.	New York
CSM - View All Desktop Notifications	View all Customer Service Management specific desktop notifications.	Orlando
CSM - View Publications on CSM Portal	View publications on the Customer Service Management portal.	Orlando
CSM - Create Contact on CSM Portal	Create contacts on the Customer Service Management portal.	Orlando
CSM: Validate Outage widgets in CSM Portal	Validates various types of outages and the corresponding widgets shown on the Customer Service Portal home page and the Install Base page.	Quebec
CSM - Create case from Portal as Consumer Contributor	Creates a customer case from the portal by a user with the consumer contributor user role (sn_customerservice.consumer_contributor). **Note:** Requires Business Location, Customer Household Data Model, and CSM Contributor User.	Rome
CSM - Create case from Portal as Account Contributor	Creates a customer case from the portal by a user with the account contributor user role (sn_customerservice.account_contributor). **Note:** Requires Business Location, Customer Household Data Model, and CSM Contributor User.	Rome
CSM - Add related parties on Case and perform action on case as Related party	Verify the ability to add related parties to the case and perform actions on the case	Rome

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CSM Portal test suite (continued)

Test	Description	Release version
	as related parties through the CSM Portal.	
CSM - Create product case as an account consumer from the CSM Portal	Create a product case as an account from the customer service portal. **Note:** Requires Customer Service Portal. Also requires that the test be run as admin.	Australia

CSP Portal test suite

Test	Description	Release version
CSP - Create product case as consumer from CSP Portal	Create a product case as a consumer from the Consumer Service Portal. **Note:** Requires the Consumer Service Portal. Also requires that the test be run as admin.	Madrid
CSP - Search on homepage	Search for information from the Consumer Service Portal. The search includes cases, knowledge articles, and Community threads.	New York
CSP - Update support profile	Update a consumer's profile from the Consumer Service Portal.	New York
CSP - Register your product	Register a product from the Consumer Service Portal.	New York
CSP - Provide requested info on case	From the Consumer Service Portal, the consumer can provide information for a case that was requested by the agent.	New York
CSP - Accept proposed solution on case	Accept a proposed solution for a case from the Consumer Service Portal.	New York
CSP - Provide feedback on Survey	Provide feedback on a survey after a case is closed from the Consumer Service Portal.	New York
CSP - View publications on CSP Portal	View publications on Customer Service portal.	Orlando

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CSP Portal test suite (continued)

Test	Description	Release version
CSP - Create product case as an internal unified consumer from CSP Portal	Verifies creating a product case as an internal unified consumer from the CSP portal. Requires the Customer Service and Consumer Service Portal plugins with the Customer Service Management (CSM) demo data plugin.	Yokohama
CSP - Create product case as an external unified consumer from CSP Portal	Verifies creating a product case as an external unified consumer from the CSP portal. Requires the Customer Service and Consumer Service Portal plugins with the Customer Service Management (CSM) demo data plugin.	Yokohama
CSP - Create household member as an account consumer from the CSM Portal	Create a household member as an account from the customer service portal. **Note:** Requires Customer Service Portal. Also requires that the test be run as admin.	Australia

Guided Decision - Next Best Action ATF test suite

Test	Description	Release version
Validate Next Best Action List- Guided Decisions	Validates the list of next best actions recommended based on the configured rules.	San Diego
Validate Next Best Action Ranking- Guided Decisions	Validates the list of next best actions recommended based on the configured rules.	San Diego

TC: Targeted Communications test suite

Test	Description	Release version
TC - Create Recipient List	Create a recipient list with the required parameters. Verify the new recipient list in the related list "Recipients".	Orlando
TC - Create Publication	Create a publication. The publication is published based on the publication	Orlando

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TC: Targeted Communications test suite (continued)

Test	Description	Release version
	date and verify if an user in the recipient list gets the publication.	

CSM Walkup Experience tests

Test	Description	Release version
CSM Walkup: Check-in as a walkup user, look at the queue, and submit a survey	As a walk-up user, perform check-in, look at the queue, and submit feedback through a survey. **Note:** This test works when the Seattle location, available with demo data, is available.	Rome

CSM: Customer Project Management tests

Test	Description	Release version
CSM PPM: Case creation from project workflow	As a customer service agent, create a case from a CSM project record in CRM Workspace.	Yokohama
CSM PPM: Case creation from project task workflow	As a customer service agent, create a case from a CSM project task record in CRM Workspace.	Yokohama

Customer data

Customer data for Customer Service Management (CSM) consists of information about people who aren't part of your organization, including accounts, contacts, consumers, and households.

Different entities within Customer Data

Accounts

An account is a customer or a partner who sells to and supports other customers. Accounts can be customer accounts, partner accounts, or both, and their information is stored in the Account [customer_account] table.

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Note: Starting with the Australia release, the following fields are added to the Customer Account (customer_account) table to improve business identification and record management:

- DUNS Number - Store the Data Universal Numbering System (DUNS) identifier for your business accounts to support data enrichment and third-party integrations.
- Active - Indicates whether an account record is currently active for filtering and workflow purposes.

There are two types of accounts: customer accounts and partner accounts.

- A partner is a supported external customer that sells to and supports other customers. A partner can report and manage cases on behalf of customers. A partner can also be a customer.
- An account can be a customer account, a partner account, or both. The **Customer** and **Partner** fields on the Account form denote the account type.

Contacts

A contact is an employee of an account and can be associated with only one account. Contacts can have multiple assets and service contracts and can log in to the Customer Service Portal.

Contact information is stored in the Contact [customer_contact] table.

Consumers

In the business-to-consumer (B2C) model, consumers are customers, and their information is stored in the Consumer [csm_consumer] table.

Households

A household is a group of consumers who live at the same address and share products and services. A household can have a designated head of household and multiple current members. The head of household has access to all cases and information for the other household members.

Household information is stored in the Household [csm_household] table.

Granular administrative roles for Customer Data Foundation (CDF)

Implemented new administrative roles that provide fine-grained access control across Customer Data Foundation (CDF). These roles can be assigned to administrators and other personas based on job functions and security requirements. It includes the following enhancements:

- Added 25 new admin roles with specific read, write, create, and delete permissions.
- Updated "Before you begin" sections across all Customer Data Foundation configuration topics with role prerequisites.
- Enhanced security compliance through role-based access segregation.

For detailed information on the granular admin roles in CDF and their associated privileges, see Platform security granular admin roles.

Configure accounts and contacts

An account is a supported external customer and a contact is a user who is an employee of an account.

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Before you begin

Role required: One of the following roles:

- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- admin

About this task

There are two types of accounts: customer accounts and partner accounts. The **Customer** and **Partner** fields on the Account form denote the account type. An account can be a customer account, a partner account, or both.

A partner is a supported external customer that sells to and supports other customers. A partner can report and manage cases on behalf of customers. A partner can also be a customer.

Note: After importing customer account data, you must also set the account code system property.

An account can have multiple contacts but a contact can be associated with only one account. A contact can have one or more associated assets and service contracts. A contact can also have a user ID and can log in to the customer portal.

Note: A contact is a user in the system. If you create a contact, that person is also added to the User table (sys_user).

Procedure

- You can import existing accounts and contacts using guided setup.
- You can create accounts and contacts using the Customer Service Management application.

Related topics

Create customer accounts

Account hierarchy

Import accounts and contacts with guided setup

Use Customer Service Management guided setup to import existing accounts and contacts.

Before you begin

Role required: import_admin, sn_crm_foundation_admin, and csm_guided_setup_user

About this task

After importing customer account data, you must also set the account code system property.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Foundation Data category, select **Get Started**.
3. Select one of the following:
   - **Import Accounts**
   - **Import Contacts**
4. Upload data from an external data source into an import set.

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5. Create a transform map.
6. Execute the transform map to transfer the data.
7. Verify that the data records are imported into the target table.

Account codes and account paths

An account code is a unique identifier for an account, while an account path establishes the account hierarchy.

Account codes

An account code is a unique key that identifies an account in a ServiceNow instance. This code is stored in the **Account Code** field on the Account form.

An account code must be unique. Attempting to insert a new record with previously existing account code in the Account [customer_account] table, the value for the code results in the following error:

```
java.sql.BatchUpdateException: Duplicate entry for key
account_path
```

Account paths

An account path establishes the hierarchy among different accounts. This path is stored in the **Account Path** on the Account form.

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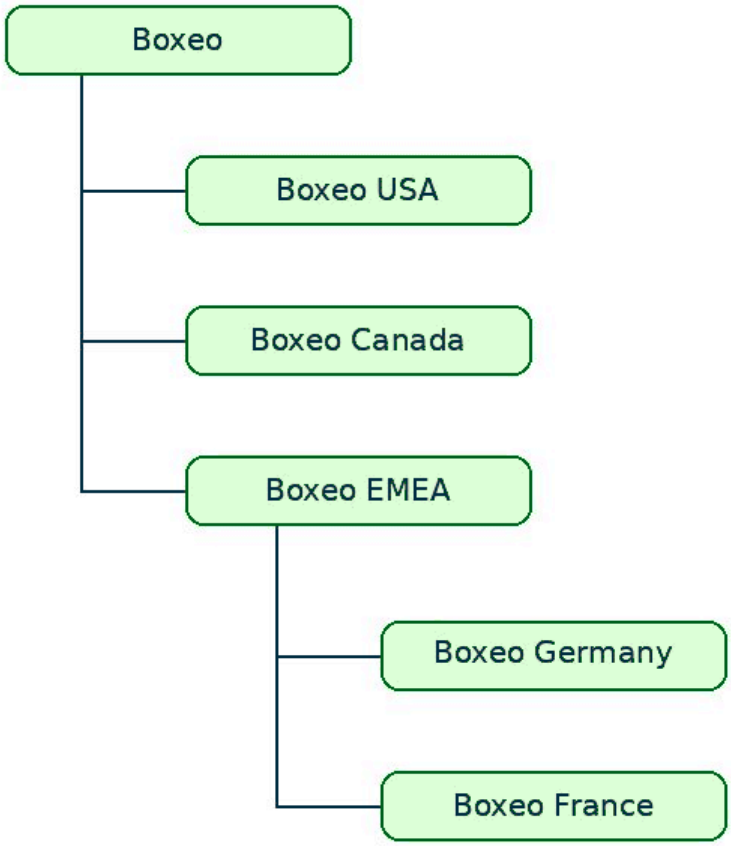
An account path is a combination of the account codes for each account in the hierarchy. For example, let's use the following accounts to demonstrate account



paths.

Example of accounts to demonstrate account paths

Account	Account Code	Account Path
Boxeo	~~~~1	~~~~1 Boxeo is the parent company. The account path for Boxeo is the same as the account code, which indicates that it's the first element in the hierarchy.
Boxeo USA	~~~~2	~~~~1/~~~~2 Boxeo USA is a child company of Boxeo. The structure of the account path is interpreted as Boxeo/Boxeo USA.
Boxeo EMEA	~~~~3	~~~~1/~~~~3

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Example of accounts to demonstrate account paths (continued)

Account	Account Code	Account Path
		Boxeo EMEA is also a child company of Boxeo and the structure of the account path is interpreted as Boxeo/Boxeo EMEA.
Boxeo France	~~~~5	~~~~1/~~~~3/~~~~5 Boxeo France is a child company of Boxeo EMEA. The structure of this account path is interpreted as Boxeo/Boxeo EMEA/Boxeo France.

Importing account records

If you create your account records by importing the data from some source system through a transform map, make sure that you execute the business rules. The Account Path is added, updated, and deleted based on the insertion, updating, and deletion of records in the Account [customer_account] table through the business rules. If the business rules aren't executed, it can result in empty account paths, which can then result in data access issues.

Note: If you don't execute the business rules during import, run the script in the **Update account path** business rule for the newly imported records to set the account paths correctly.

Set the account code property

After importing customer account information, update the *com.snc.cs_base.last.generated.code.tree.path* property with the correct account code value.

Before you begin

Role required: import_admin and sn_crm_foundation_admin

About this task

The *com.snc.cs_base.last.generated.code.tree.path* system property stores the **Account Code** value for the most recently created customer account in the Account (customer_account) table.

When you create a customer account record, the system uses this property to generate a unique account code. The property is then updated with the latest value, confirming the next account record receives a new unique code.

The value of the *com.snc.cs_base.last.generated.code.tree.path* property must match the value of the Account Code field for the last inserted customer account record. When you create customer account records by importing data from other sources or instances, these values can get out of synchronization. If these values don't match, the system generates an error on the creation of the next new record in the Account table:

```
java.sql.BatchUpdateException: Duplicate entry for key
account_path
```

Use the following steps to fix this error.

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Procedure

1. Determine the highest or last used account code value from the account (customer_account) table.
2. Navigate to the System Property [sys_properties] table.
3. Set the `com.snc.cs_base.last.generated.code.tree.path` property to the value determined in step 1.

Create customer accounts

An account is a supported external customer. Use the Customer Service Management application to create account records.

Before you begin

Role required: One of the following roles:

- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice_manager
- admin

About this task

There are two types of accounts: customer accounts and partner accounts. The **Customer** and **Partner** fields on the Account form denote the account type. An account can be a customer account, a partner account, or both.

A partner is a supported external customer that sells to and supports other customers. A partner can report and manage cases on behalf of customers. A partner can also be a customer.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** and select one of the following actions:
   - To create a customer account, select **Accounts**.
   - To create a partner account, select **Partners**.
2. Select **New** and fill in the fields on the Account form.
   When a new customer account record is created, the system uses the `com.snc.cs_base.last.generated.code.tree.path` system property to determine a unique account code value for the account. The property is updated with the latest value to confirm the next account record receives a unique account code.

   Note: If the property is reset to its original value, the system might attempt to create accounts using already assigned account codes, which can result in an invalid insert.

3. Select **Submit**.

Create additional account addresses

An account can have multiple addresses, such as a main address and shipping and billing addresses.

Before you begin

Role required: One of the following roles:

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- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice_manager
- admin

About this task

The main address for an account is stored in fields on the Account form. Shipping and billing addresses for an account are created and stored in the **Addresses** related list. An account can have multiple shipping and billing addresses.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts**.
2. Select the number of the desired account.
3. In the **Addresses** related list, select **New**.
4. Fill in the fields on the Location form.
5. Select an address type, either **Billing** or **Shipping**.
6. **Optional:** Enable the **Primary** field.
   If you have multiple billing or shipping addresses, use this field to designate one as the primary address.
7. Select **Submit**.

Create customer contacts

A contact is a user who is an employee of an account. Use the Customer Service Management application to create contact records.

Before you begin

Role required: One of the following roles:

- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice_manager
- admin

About this task

An account can have multiple contacts but a contact can be associated with only one account. A contact can have one or more associated assets and service contracts. A contact can also have a user ID and can log in to the customer portal.

Note: A contact is a user in the system. If you create a contact, that person is also added to the User table (sys_user).

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Contacts**.
2. Select **New** and fill in the fields on the Contact form.
3. Enter the contact information, such as the name, email address, and phone number.
4. Enter the name of the contact's company in the **Account** field.
5. Select the **Timezone**.
6. Select a **Language**.
7. Select a **Notification** setting.
8. Select **Submit**.
   After a registration request is approved, the customer contact receives an email with a user ID and temporary password. When logging in for the first time, the contact is asked to change the password.

Create customer relationships

The Customer Service Management application provides the ability to establish different types of relationships between partners, customers, and contacts.

These relationships make account and asset management easy and flexible. The following table describes the available customer relationships.

Note: To use this functionality, you must have sn_crm_foundation_data_manager or sn_crm_foundation_admin role.

Customer relationships

Relationship	Description	Benefit
Bi-directional account relationship	Create a relationship between: • A partner account and a customer account. • Two customer accounts. A bi-directional account relationship is created using a defined account relationship type.	An account relationship enables partner account contacts with the partner role or the partner administrator role to create and manage cases for their partner account.
Account hierarchy	Create a parent-child relationship between accounts.	An account hierarchy enables an account contact with the customer administrator role to manage the child accounts.
Contact relationship	Add a contact from a third account to either of the accounts in an account relationship.	A contact relationship enables a contact with the customer role or customer administrator role to manage the account for which the contact relationship has been established.

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Account hierarchy

Use the account hierarchy feature to create and view a parent-child relationship between accounts.

An account hierarchy The account hierarchy uses a tree structure to show the parent, child, and sibling accounts. This structure represents the legal entity structure of the accounts and their relationships.

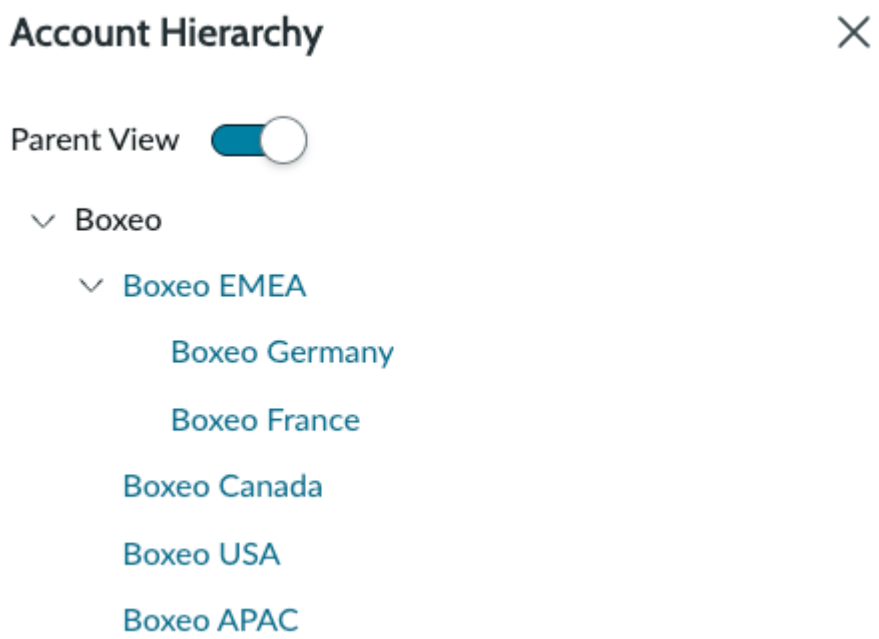
Agents can do the following from the account hierarchy:

- Expand and collapse the tree structure.
- Switch between the parent view and the full view.
- Select an account to open the related Account form.

Account hierarchy in the workspace view

To view the account hierarchy in CRM Workspace, navigate to an account record and select the Open Hierarchy ( ) icon on the **Account** field.

Account hierarchy (workspace)



Two different views of the account hierarchy are available.

- Enable **Parent view** to see the current account, the parent account (if applicable), and any child or sibling accounts.
- Disable **Parent view** to see only the parent account.

Account hierarchy in the Core UI view

In the Core UI, the account hierarchy is available in the Account Hierarchy section on the Account form. Two different views of the account hierarchy are available. In both views, the current account is highlighted in the account structure.

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- **Parent view:** Displays the current account, the parent account (if applicable), and any child or sibling accounts.
- **Full view:** Displays the entire structure of the organization from the root account.

Configuring the account hierarchy

Users with the system administrator role can define the hierarchy between accounts on the Account form by using the **Parent Account** field.

- From the Account form for the child account, select the parent in the **Parent Account** field.
- For top-level accounts, don't fill in the **Parent Account** field.

Create an account hierarchy

Create a parent-child relationship between two accounts.

Before you begin

Role required: One of the following roles:

- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin,
- admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts**.
2. Select the desired child account.
3. Select the parent for this account in the **Parent Account** field.
4. Select **Update**.
   The account hierarchy is displayed in a tree map on the Account form for the parent account.

Bi-directional account relationships

A bi-directional account relationship is a relationship that exists between two accounts. You can create account relationships between two customer accounts or between a partner account and a customer account.

A bi-directional account relationship is based on a defined account relationship type. Creating a bi-directional account relationship is a two-step process that involves:

- Defining the types of relationships that exist between your partners and customers.
- Using these relationship types to create relationship records between selected accounts.

You can view relationship records on the Account form for either account in the relationship. These records are stored in the **Account Relationships** related list.

For relationships between a partner account and a customer account, contacts with the Partner or Partner administrator role can create and manage cases for their customer accounts.

Account relationship types

An account relationship type defines a relationship that can exist between accounts. Users with the administrator role can define the following account relationship types:

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- Account to account
- Partner to account

When creating an account relationship type, you define the following information on the Account Relationship Type form:

- The type of **source** account (account or partner).
- The type of **target** account (account or partner).
- The relationship between the source account and the target account.
- The reverse relationship between the source account and the target account.

Note: One default account relationship type is provided for partner accounts.

Account relationship records

Once an account relationship type is defined, users with the Customer Service Manager role can use it to create relationships between specific accounts or partners. An account relationship record includes the following information:

- A source account, selected in the **Account From** field.
- A target account, selected in the **Account To** field.
- The account relationship type that this relationship record is based on.
- The relationship and the reverse relationship of the selected accounts.

View a relationship record from either account:

- The relationship (**Account From** > **Account To**) appears in the **Account Relationships** related list on the source account record.
- The reverse relationship (**Account To** > **Account From**) appears in the **Account Relationships** related list on the target account record.

Select the account relationship record from either account to see the Account Relationship form.

You can also view account relationship records that use a specific account relationship type. This information appears as a related list on the Account Relationship Type form. This list shows the source account (**Account From** field) and the target account (**Account To** field) for each account relationship record.

Create an account relationship type

Create an account relationship type by defining the types of source and target accounts and providing a name for the relationship between these accounts.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager
- sn_crm_account_relationship_data_manager,
- admin

About this task

Use the following steps to create an account relationship type.

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You can edit an existing account relationship type by changing the types of source and target accounts and the name of the relationship that exists between these accounts. If that account relationship type is being used by any account relationship records, the **Relationship** and **Reverse relationship** fields in those records are automatically updated.

You can also delete an existing account relationship type.

- If there are no account relationship records that use the account relationship type, then it's deleted.
- If there are active account relationship records that use the account relationship type, an attempt to delete that relationship type results in a warning message. Deleting an account relationship type also deletes the relationship records based on that type.

Account relationship types can be set to inactive at any time.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Account Relationship Types**.
2. Select **New**.
3. Fill in the fields on the Account Relationship Type form.

Account Relationship Type form fields

Field	Definition
Relationship type	A unique name that identifies the type of relationship. For example, Service Provider.
From	The type of source account for this relationship type; can be either an account or a partner.
Relationship	A text field where you can name the relationship from the source account to the target account. For example, Service provider for.
To	The type of target account for this relationship type; can be either an account or a partner.
Reverse relationship	A text field where you can name the reverse relationship from the target account to the source account. For example, Customer of.
Active	Sets the account relationship type as active or inactive. Active account relationship types can be used to create account relationship records. An account relationship type can be set to inactive at any time.

4. Select **Submit**.
   The new account relationship type appears on the Account Relationship Types list.

Create an account relationship record

Create an account relationship record by selecting the account relationship type and then selecting the accounts involved in the relationship.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_data_manager,
- sn_crm_account_relationship_data_manager

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- sn_customerservice_manager
- sn_crm_foundation_admin,
- admin

About this task

The administrator can create a relationship record for an account from the **Account Relationships** related list on the Account Relationship Type form.

The customer service manager and the administrator can create a relationship record for an account from the **Account Relationships** related list on the account or partner record.

Deleting a relationship record for an account also deletes the reverse relationship record.

Note: Deleting a relationship record doesn't have any impact on customer service cases that refer to the relationship record.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. From the **Account Relationships** related list, select **New**.
4. Fill in the fields on the Account Relationship form.

Account Relationship form fields

Field	Definition
Account From	The source accounts for this relationship. If you're creating the relationship from an account or partner record, this field is automatically filled in; otherwise, make a selection from the Accounts list.
Relationship Type	Select the account relationship type for this record. If you're creating the record from an Account Relationship Type form, this field is automatically filled in. Otherwise, make a selection from the Account Relationship Types list, which shows all active account relationship types.
Account To	The target accounts for this relationship.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

   Once a relationship record has been created, it appears in two places:

   - The relationship appears in the **Account Relationships** related list on the source account record.
   - The reverse relationship appears in the **Account Relationships** related list on the target account record.

Contact relationships

You can add a contact from one account to another account by using a contact relationship in the Customer Service Management (CSM) application. By using contact relationships, you can perform actions on behalf of the accounts that you established a contact relationship with.

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Overview of contact relationship

A contact is a user who serves as an employee of an account. To associate a contact with additional accounts, contact relationships are used. These contact relationships enable a contact with the customer role or customer administrator role to manage the account that you established a contact relationship with. These contacts can view the information and perform actions on behalf of the accounts, such as creating or updating cases from the customer portal.

Related topics

Configuring a contact relationship

Create a contact relationship for an account

Contact Relationship form

Configuring a contact relationship

You can configure a contact relationship to establish a relationship between an account and a contact in the Customer Service Management (CSM) application.

Configuring the contacts to be associated with an account

When you create a contact relationship, you select a user from the **Contact** field. This field displays the contacts from:

- All accounts in the account relationship
- All accounts in the account hierarchy
- All accounts, if the *sn_customerservice.contact_relationship.restrict_within_account_hierarchy* system property is set to **false**. However, when the *sn_customerservice.contact_relationship.restrict_within_account_hierarchy* system property is set to **true**, only the contacts within the account hierarchy and account relationship are displayed.

  Note: By default, the *sn_customerservice.contact_relationship.restrict_within_account_hierarch* system property is set to **true**.

If you're a customer service manager (sn_customerservice_manager), CRM foundation admin (sn_crm_foundation_admin), CRM foundation data manager (sn_crm_foundation_data_manager), or an Account relationship data manager (sn_crm_account_relationship_data_manager), you can create, update, delete, and view the list of contact relationships for an account. If you're a customer service manager (sn_customerservice_manager), customer service agent (sn_customerservice_agent), CRM foundation data viewer, (sn_crm_account_relationship_viewer), or and Account relationship viewer (sn_crm_foundation_data_viewer), you can view a list of the contact relationships for an account.

When you select a responsibility for the contact, the responsibilities that are available are those responsibility definitions that are created with a type of **Contact**.

Note: A contact can only be assigned with one responsibility per account.

Configuring multiple contact relationships per account for a contact

Before the Vancouver release, configuring multiple contact relationships for a contact with an account wasn't enabled. The database-level unique index `company_contact` can be turned off only by the administrators.

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Starting with the Vancouver release, the Customer Service Management (CSM) application replaced the unique index and introduced the **Prevent duplicate for account-contact** business rule. This business rule enables administrators to disable the restriction of a unique index combination in the contact relationship by setting the **Active** flag to **False**. As a result, an administrator can assign multiple responsibilities per account for a contact.

Create a contact relationship for an account

Create a contact relationship for an account by selecting a contact and then assigning a responsibility to that contact in the Customer Service Management (CSM) application. Through this relationship, a contact can effectively manage the accounts and can execute actions on behalf of the associated accounts.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager
- sn_crm_account_relationship_data_manager
- sn_customerservice_manager
- admin

About this task

Starting with the Brazil release, Customer Service Management (CSM) introduced the `Prevent duplicate for account-contact`business rule. By using this business rule, an administrator can assign multiple responsibilities per account for a contact.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. In the Contact Relationships related list, select **New**.
4. On the form, fill in the fields.

Contact Relationship form fields

Field	Definition
Account	The account to which the contact is assigned. This field is automatically filled in.
Contact	The customer contact selected to fulfill the role or responsibility. The Contacts list includes contacts from any related partner or account as well as contacts from the account hierarchy.
Type	Defines the label for the relationship with the selected user. You can select the type from the list of related party configurations. **Note:** Starting with the Yokohama release, the **Type** field is added to the Contact Relationship form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.
Responsibility	Role or responsibility selected for this customer contact.

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Field	Definition
	Note: As part of creating a responsibility definition, the admin can specify if the responsibility is unique. If so, the responsibility can only be assigned to one contact per account. For more information, see Create account teams.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   The contact name, account, and responsibility are added to the Contact Relationships related list.

Creating an account team member

Create an account team member that is made up of both employees and customer contacts, fulfilling the jobs or roles for a particular account within the Customer Service Management (CSM) application. By defining responsibilities or roles for your team and customer contacts, you confirm that your account team has the functions needed to support customer accounts.

If you have any one of the sn_crm_foundation_admin, sn_crm_foundation_data_manager, and sn_crm_account_relationship_data_manager roles, you can create an account team by using a responsibility definition. By defining the responsibilities that you need for this account team, you create the relationships between the different entities like the accounts, contacts, and more.

If you have sn_crm_account_relationship_viewer or sn_crm_foundation_data_viewer role, you can view the Account team members table.

You can create two types of responsibility definitions. You can create a definition for an employee and a definition for a contact.

Note: If you have the sn_crm_customer_access_management_admin or sn_crm_foundation_admin role, you can also delete the definitions that are no longer used. A definition can only be deleted if it has no entries.

After these definitions or roles, are created, the sn_customerservice_manager can use these roles to do the following tasks:

- Build an account team by selecting an account, selecting a role, and then assigning a role to an employee.
- Add a contact relationship to an account by selecting an account, selecting a role, and then assigning a role to a contact.

The users who have been assigned to this role are displayed in the Account Team Members related list on the Responsibility Definition form. For more information, see the following topics:

- Create a responsibility definition
- Configure access through the responsibility access configuration

Assign a team member to an account

Assign a team member to an account by selecting an employee and their role or responsibility in the Customer Service Management (CSM) application. When a team member has the Account Manager responsibility, they can view account details and perform actions on behalf of the account.

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Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager
- sn_crm_account_relationship_data_manager
- sn_customerservice_manager

Note: Install the CSM Contributor User (com.snc.csm_contributor_user) plugin, which has been moved to App Store beginning with Australia release.

About this task

Administrators can assign a team member to an account using the Account Team Members related list on the Responsibility Definition form. Similarly, customer service managers can assign team members to an account using the Account Team Members related list on the account or partner record.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. From the Account Team Members related list, select **New**.
   The account team member must have a sn_customerservice.relationship_contributor role.
4. On the form, fill in the fields.

Account Team Member form fields

Field	Definition
Account	Account that the user is assigned to. If you're assigning a user from an account or partner record, this field is automatically filled in. If not, you can select an account from the Accounts list.
User	Employee selected to fulfill the role or responsibility. **Note:** Starting with the Vancouver release, the External Organization Staff [sn_csm_service_organization_external_staff] can be added as Account Relationship Managers through Account Team Members (Account Staff Relationships).
Type	Defines the label for the relationship with the selected user. You can select the type from the list of related party configurations. **Note:** Starting with the Yokohama release, the **Type** field is added to the Account Team Member form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.
Responsibility	Role or responsibility selected for this employee.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.
Active	Indicates whether this team membership is currently in effect.

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Field	Definition
	Note: The default value is set to **True**. If the active flag is **True**, access is granted through the relationship. However, if the active flag is **False**, no access is granted through the relationship.
Start date	Date when the relationship is set to active.
End date	Date when the relationship ends or is closed. **Note:** If both dates are set, the end date must be later than the start date.

5. Select **Submit**.

Enhanced address data model for accounts

Define addresses once and reuse them within an account hierarchy, or across account hierarchies.

Businesses often must share addresses between accounts, within an account hierarchy, or across hierarchies. An enhanced address data model makes it possible to link a location with multiple accounts without creating multiple location records.

The enhanced address data model maintains the relationship between accounts and addresses in a new table. By default, this feature is enabled for the new customer service management (CSM) customers. However, it's optional for upgrade customers.

Related topics

Account Address table

Enable enhanced address model for accounts

Associate an address to an account

Reusing addresses between multiple accounts

Account Address table

Avoid duplication of address records by using the Account Address table.

The Account Address [account_address_relationship] table maintains the relationship between an address and the accounts that use that address.

The Account Address table eliminates the need to duplicate address records that must be reused across multiple accounts. The Account Address table provides details like the name and the location of the account. The table also provides information on the type of account address, and whether the account is primary or not.

The Account Address table is available for use when the Enhanced address data model for accounts feature is enabled. For more information on enabling the feature and configuring the Account Address table, see Enable enhanced address model for accounts. When address sharing is enabled, Account address related list is visible on the account and location forms.

If you have any one of the sn_crm_account_data_manager, sn_crm_account_relationship_data_manager, sn_crm_foundation_data_manager, and sn_crm_foundation_admin, roles, you can create, update, view and delete account address

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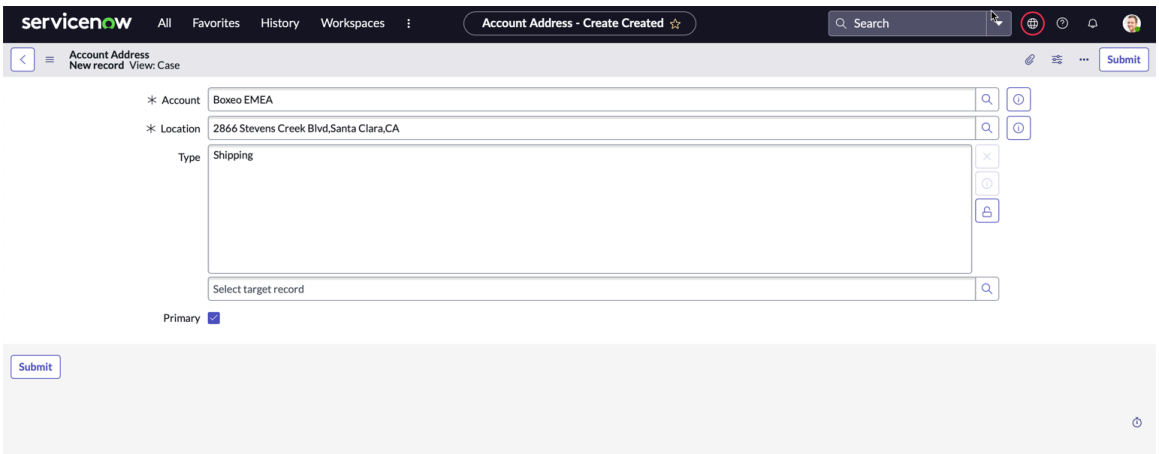
records. If you have the sn_crm_account_viewer, sn_crm_account_relationship_viewer, or sn_crm_foundation_data_viewer role, you can view the account address records.

Account address table

Field	Description
Location	The location or address associated with the account.
Account	The name associated with the account.
Primary	An account can only have one primary address.
Type	The type of account address, whether Billing, Shipping or Mailing.

Account Address form



Related topics

Enable enhanced address model for accounts

Associate an address to an account

Account address access for contacts

Enable contacts and similar roles to access addresses linked to their accounts. This access enables them to view and select account-related addresses and the corresponding location records tied to those accounts.

Account Address overview

Account Addresses [account_address_relationship] table acts as a bridge between accounts and locations, enabling you to associate multiple locations with a single account. They also enable the reuse of the same address record across multiple accounts using shared references.

Accessible Accounts overview

Accessible accounts are customer accounts that a contact can access based on their role and access configuration. Contacts can access their accounts through:

- Direct association with accounts
- Association to the accounts through customer relationships
- Assigned roles or access control list (ACL) permissions

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This feature extends account address and location access to external roles such as:

- Contact [sn_customerservice.customer]
- Contact Admin [sn_customerservice.customer_admin]
- Customer Case Manager [sn_customerservice.customer_case_manager]
- Customer Account Admin [customer_account_admin]
- Partner [sn_customerservice.partner]
- Partner Admin [sn_customerservice.partner_admin]
- Contact Manager (internal) [sn_customerservice.contact_manager]
- Roles that inherit the Contact [sn_customerservice.customer] role

Each of these external roles already has access to their associated accounts. However, they didn't previously have access to the associated account addresses and locations. With this enhancement, they can access the related account addresses and location records for those accounts.

This feature extends account address and location access to following granular admin roles with create, update, view, and delete privileges:

- Account data manager [sn_crm_account_data_manager]
- Account relationship data manager [sn_crm_account_relationship_data_manager]
- CRM foundation data manager [sn_crm_foundation_data_manager]
- CRM foundation admin [sn_crm_foundation_admin]

This feature extends account address and location access to following granular admin roles with read-only access:

- Account viewer [sn_crm_account_viewer]
- Account relationship viewer [sn_crm_account_relationship_viewer]
- CRM foundation data viewer [sn_crm_foundation_data_viewer]

Contact access to account-related addresses

Contacts can access account addresses and corresponding location records through different types of account relationships. These relationships determine which accounts and addresses they can view or interact with.

- My Account: It’s a direct, one-to-one relationship between the contact and it's assigned account. For example, a service provider is added as a contact under the parent account. Through the parent-child hierarchy, they can view and manage cases, addresses, and locations across child accounts in different regions.
- Other Accessible Accounts: They’re additional accounts that contacts can access indirectly, through one of the following relationships:
  - Account Hierarchy: Access is inherited through parent-child account relationships. If a contact is associated with the parent account, they might automatically access the child accounts. For example, a global IT manager associated with the parent account can view and manage cases, addresses, and location records from regional teams under child accounts.
  - Account Relationship: Access is granted through formal associations between two customer accounts that aren’t part of a hierarchy, and can be unidirectional or bidirectional. For example, a partner account managing support for products from another organization.

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Through this relationship, contacts from the partner account can access the addresses of the associated customer account.

- Contact Relationship: Access is granted when a contact is linked to another customer account they don't belong to directly. This relationship is commonly used where a contact works across multiple accounts, such as an external service provider. For example, a consultant working with three client organizations can access the associated addresses and locations of all three accounts.

Enable enhanced address model for accounts

Use the Account Address table in the enhanced address data model feature to link a location with multiple accounts without creating duplicate location records.

Before you begin

Role required: sn_crm_foundation_admin, script_include_admin, and script_fix_admin

Procedure

1. Take a backup of the location data associated with accounts from the Location [cmn_location] table.
2. Create the custom relationship fields in the Account Address [account_address_relationship] table if they have already been created in the Location table.
   The newly created fields in the Account Address table must have the same name and type as the fields in the Location table. The base system provides two relationship fields.
   - **Type**
   - **primary**

   These relationship fields are created in the Account Address [account_address_relationship] table. For more information on creating fields within a table, see Add and customize a field in a table.
3. Update the custom code that references the Account Address table.
   The custom code can include elements that fetch the address of accounts in the Account Address table. Such elements can be reference qualifiers, script includes, business rules, and access control lists (ACLs) referencing to the Location table.
4. Move the account-related data from the Location table to the Account Address table.
5. Run the following migration script.

```
var customRelationshipFields = []; //Add custom relationship
 fields (if any).
var account = ""; //You must specify the sys_id of the account
 if you wish to migrate location data for that account (mostly
 to be used during re-run).
var migrateChildAccountLocations = false; // This value must be
 set to true if you wish to migrate the locations of the child
 accounts associated with the specified account (mostly to be
 used during re-run).
new
 sn_cs_base.CSDataFix().migrateLocationDataToAccountAddress(cus
tomRelationshipFields, account, migrateChildAccountLocations);
```

Performing a rerun of the script if there's a difference between the number of records that must be migrated and the number of records already migrated. In there's a rerun, already migrated locations aren't migrated again. To rerun the migration for already migrated locations, delete the corresponding records in the account address table.

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6. Avoid accidental data entry by deactivating the Account and Custom Relationship fields from the Location table.

   Note: You must not deactivate Type and Primary attributes.

   This deactivation removes the Account and the Custom Relationship fields from the location-related forms, lists, and related lists.

7. Set the system property *enable_account_address_sharing* to true.
   This property enables the enhanced address data models for accounts. The Account Addresses related list is displayed on the account and location form.

Associate an address to an account

You can associate addresses to an account using the Account Address related list on the account form or the location form.

Before you begin

Note: You must possess the Update privilege, or the authority to grant Update access to account information, to enable the association of locations (account addresses) with the account.

Role required: One of the following roles:

- admin
- customer_admin
- sn_customerservice_manager
- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin

Procedure

1. Associate an address to an account from either the account form or the location form.
   - To associate an address to an account from the account form, navigate to **All** > **Customer Service** > **Accounts**.
   - To associate an address to an account from the location form, select **All** > **Customer Service** > **Locations**.
2. Select an account from the list of existing accounts.
3. Navigate to **Related List** > **Account addresses** and select **New**.
4. Fill the details in account address form and select **Submit**.
   For more information about the table fields, see Account Address table.

Reusing addresses between multiple accounts

You can reuse the same addresses between multiple account records.

You can reuse the same address between multiple accounts within the account hierarchy or between non-related accounts. Use the account hierarchy feature to create a parent-child relationship between accounts.

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To enable address sharing between accounts in the account hierarchy, see Address sharing through account hierarchy.

To share addresses between non-related accounts, see Share an address through non-related accounts.

Address sharing through account hierarchy

You can reuse the same address between multiple accounts within the account hierarchy.

Before you begin

Role required: One of the following roles:

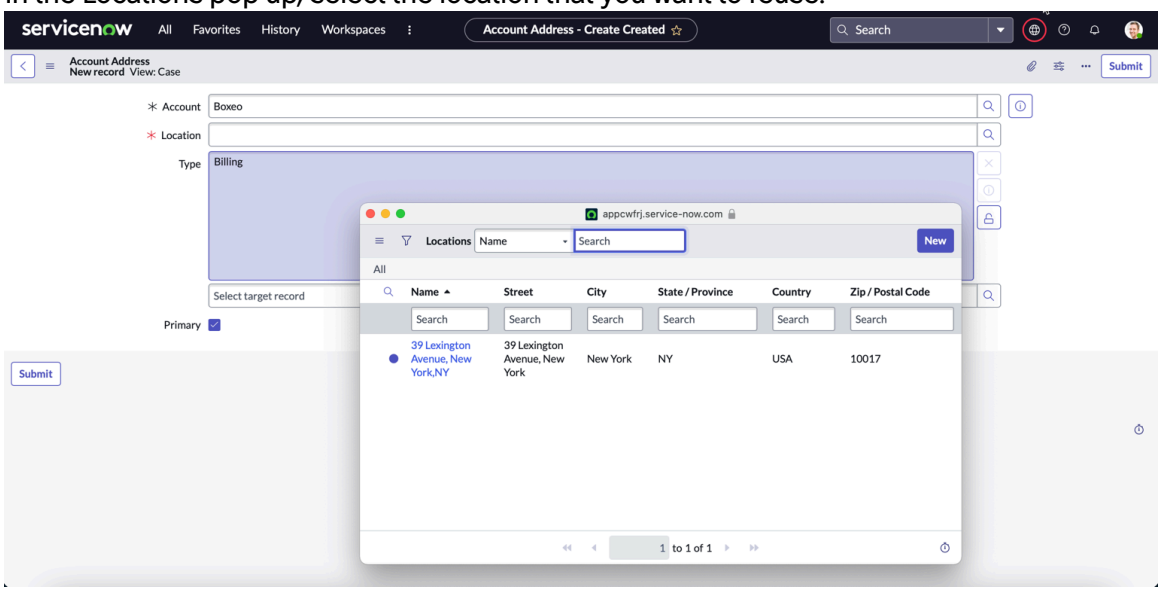
- admin
- sn_customerservice_manager
- sn_crm_account_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts**.
2. Select an account and navigate to **Related List**> **Account Addresses**.
3. Select **New**.
4. See all the locations associated with the selected account in the account hierarchy by selecting the search icon next to the **Location** field.

   Note: The **Account** field is already populated with the name of the account.

5. In the Locations pop up, select the location that you want to reuse.



6. Select **Submit**.

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Related topics

Reusing addresses between multiple accounts

Share an address through non-related accounts

Share an address through non-related accounts

Enable your users to reuse the same address between multiple non-related accounts. This way, you can share an address between multiple accounts by using the **Location** field on the Account Address form.

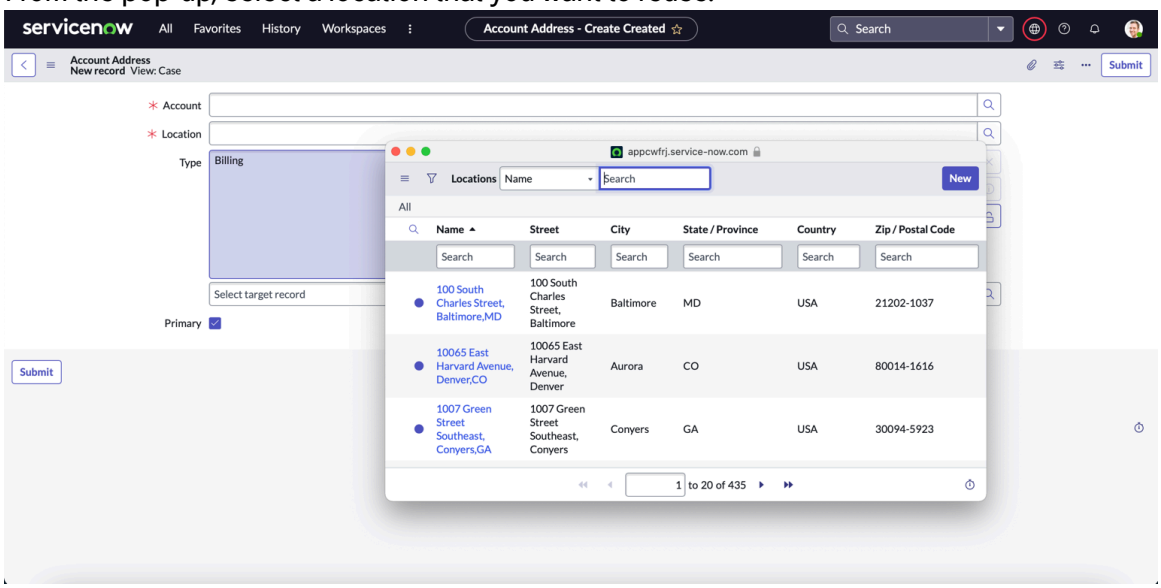
Before you begin

Role required:

- admin
- sn_customerservice_manager
- sn_crm_account_data_manager,
- sn_crm_account_relationship_data_manager,
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts**.
2. Select an account and navigate to **Related List**> **Account Addresses**.
3. Select **New**.
4. Select the search icon next to the **Location** field.
5. From the pop-up, select a location that you want to reuse.



6. Select the search icon next to the **Account** field.

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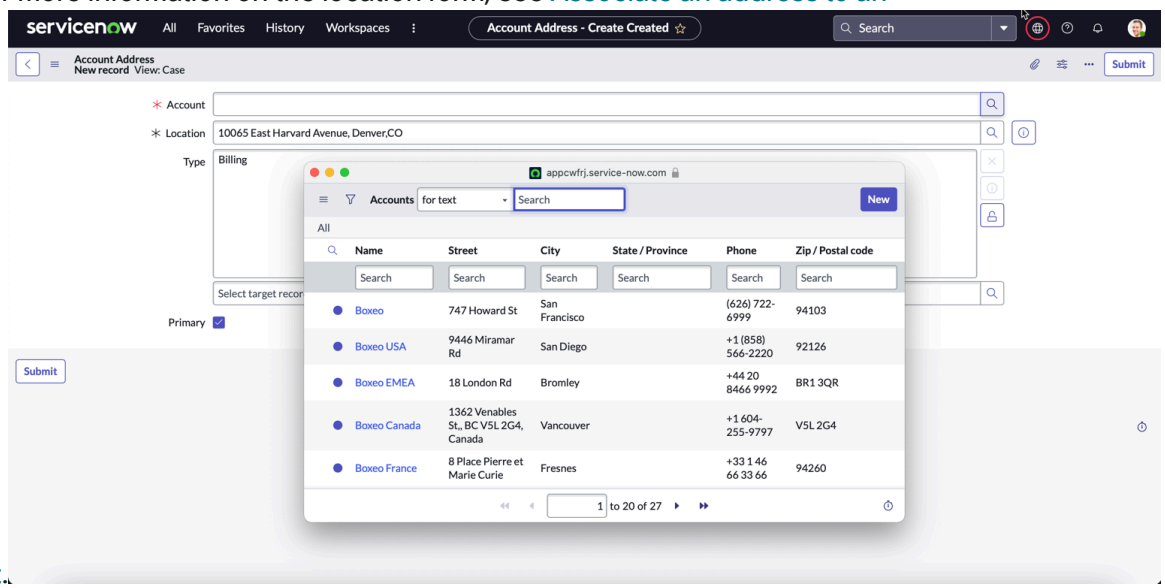
7. Choose the account for which you want to reuse the address.

Note: You can reuse addresses through non-related accounts from the location form. For more information on the location form, see Associate an address to an account.



Related topics

Reusing addresses between multiple accounts

Address sharing through account hierarchy

Deleting or editing an address on the location form

As a user, you can edit or delete an existing record in the account address table without affecting any other associated records. To use this capability, you must be an admin or a sn_customerservice_manager.

The sn_crm_account_data_manager, sn_crm_account_relationship_data_manager, sn_crm_foundation_data_manager, and sn_crm_foundation_admin roles also have the privilege to edit existing records in account address table.

If a location record is associated with multiple accounts, you must have Update access to all associated accounts to modify the fields of the location record. This access requirement confirms that location details can only be updated when you have the necessary permissions for every account linked to the shared location.

To delete an address in the location table, select **Delete** from the location form or from the location list. Similarly, to edit a location form, select **Edit**.

Data migration from Location to Account Address table

Migrate your data from the Location table to the Account Address table.

Migrate data by following the steps provided in the Customer Service guided setup.

To access the guided setup, navigate to **Customer Service** > **Administration** > **Guided Setup** > **Foundation Data** > **Enable Enhanced Address Data Model for Accounts**.

Note: Review step 4 within the Enable enhanced address model for accounts to get details on how to migrate data.

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Domain separation for the Account Address table

Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can then control several aspects of this separation, including which users can see and access data.

All account address table records are present in the domain of the associated account.

Note: Any location record is originally created in the global domain. However, when the location record is associated with an account, the location record is automatically added to the account's domain. Associating the same location to multiple accounts doesn't change the domain of the location.

Configure consumers

A consumer is a customer in the business-to-consumer (B2C) business model.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Consumers can have multiple addresses, one of which is the primary address.

Procedure

- You can import existing consumers using a guided setup.
- You can create consumers using the Customer Service Management application.

Import consumers through guided setup

Use Customer Service Management guided setup to import existing consumers.

Before you begin

Role required: import_admin, sn_crm_foundation_admin, and csm_guided_setup_user

About this task

Consumers can have multiple addresses, one of which is the primary address.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**
2. In the Foundation Data category, select **Get Started** and then select **Import Consumers (B2C)**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create consumers

A consumer is a customer in the business-to-consumer (B2C) business model. Use the Customer Service Management application to create consumer records.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager

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- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice.consumer_agent
- sn_customerservice_manager
- admin

About this task

Consumers can have multiple addresses, one of which is the primary address.

Note: Note: Creating a consumer record is only one part of setting up a consumer persona. The user must also be assigned a consumer role (sn_customerservice.consumer or sn_customerservice.unified_consumer) to access consumer functionality. Without both the consumer record and the role, you can't perform consumer activities such as viewing cases, sold products, or install base items.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select **New** and fill in the fields on the Consumer form.
   For more information, see Consumer form.
3. Fill in all the required fields on the Primary Address tab.
   A consumer can have multiple addresses but only one primary address. The primary address is stored in the Primary Address tab of the consumer form within the Addresses related list.
4. **Optional:** Set the desired fields on the Preferences tab.
5. Select **Submit**.
   The record is added to the Consumers table (csm_consumer). The primary address is added to the **Addresses** related list and the **Primary** field is set to **true**.

Create additional consumer addresses

Consumers can have multiple addresses, including one primary address.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice.consumer_agent
- sn_customerservice_manager
- admin

About this task

The primary address is stored in the Primary Address tab of the consumer form within the **Addresses** related list. When you fill in the fields in the Primary Address tab and select **Submit**, this information is added to the **Addresses** related list as the primary address, with the **Primary** field set to true. Any changes made to the **Primary Address** fields are also updated in the related list. A consumer can have only one primary address.

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Other addresses, such as billing or shipping addresses, can be created and stored in the **Addresses** related list. For these other addresses, the **Primary** field is set to **false**.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the number of the desired consumer.
3. In the **Addresses** related list, select **New**.
4. Fill in the fields on the Location form.
5. To denote this address as the primary address for the consumer, enable the **Primary** check box.
   A consumer can have multiple addresses but only one primary address.
6. Select **Submit**.

Create a relationship between two consumers

Create a relationship between two consumers, regardless of household.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice.svc_location_manager
- sn_customerservice_manager
- admin

About this task

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a relationship between two consumers, use the Authorized Representative responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select a consumer.
3. In the Consumer Relationships related list, select **New**.
   This related list shows the current relationships that exist for the selected consumer. When you select **New**, a new Consumer to Consumer Relationship form is displayed with the **Consumer is** field filled in.
4. In the **Responsibility** field, select the **Authorized Representative** responsibility.
5. In the **of Consumer** field, select the consumer who is being represented by the consumer in the **Consumer is** field.
6. In the **Type** field, select the type from the list of related party configurations and the **Order** field specifies the sequence in which records are displayed, organized according to business preferences.

   Note: Starting with the Yokohama release, the **Type** field is added to the Consumer Relationships form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.

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7. Select **Submit**.
   The relationship is added to the Consumer Relationships related list.

Assign a team member to a consumer

Assign a team member to a consumer by selecting an employee. You can then select the employee's role or responsibility in the Customer Service Management (CSM) application.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_consumer_data_manager
- sn_customerservice_manager
- admin

About this task

If you're the administrator or a customer service manager, you can assign team members to a consumer from the Consumer Team related list.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select a consumer.
3. From the Consumer Team related list, select **New**.
4. On the form, fill in the fields.

Consumer Team Member form fields

Field	Definition
Consumer	Consumer that the user is assigned to.
User	Employee selected to fulfill the role or responsibility.
Type	Defines the label for the relationship with the selected user. You can select the type from the list of related party configurations. **Note:** Starting with the Zurich release, the **Type** field is added to the Consumer Team Member form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.
Responsibility	Role or responsibility selected for this user.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

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Creating multiple consumer profiles for a user

The concept of consumer profiles refers to the idea that an individual can have multiple profiles associated with them. For example, a consumer might have a patient profile in Healthcare and Life Sciences and simultaneously have a constituent profile in Public Sector Digital Services.

Starting with the Utah release, Customer Service Management (CSM) introduced the consumer profile (sn_csm_consumer_profile) table with a reference to the consumer (csm_consumer) table to define and support consumer profiles. When creating multiple profiles for a user within Customer Service Management (CSM), each profile can have its own set of fields and relational data like sold products, cases, interactions, and installed bases. By creating and defining consumer profiles, you can identify and differentiate profile-specific data.

Industries must use the consumer_profile column on case (sn_customerservice_case), sold product (sn_install_base_sold_product), install base item (sn_install_base_item), interaction (interaction), or child tables for any transactional data. Industries can extend the consumer profile (sn_csm_consumer_profile) table for any industry-specific use case.

Tables used by consumer profiles

Consumer profile (sn_csm_consumer_profile) column on case, sold product, install base, and interaction tables is introduced to identify and differentiate profile-specific data to be used by industries for different use-cases.

Tables and plugins

Plugin	Tables	Column added
Customer Service Base Entities [com.snc.cs_base]	Case [sn_customerservice_case]	Consumer Profile [consumer_profile]
	Sold Product [sn_install_base_sold_product]	Consumer Profile [consumer_profile]
	Install Base Item [sn_install_base_item]	Consumer Profile [consumer_profile]
	Interaction [interaction]	Consumer Profile [consumer_profile]
	Task [sn_customerservice_task]	Consumer Profile [consumer_profile]

Note: Consumer Profile (sn_csm_consumer_profile) table is an extension-only table to be used for supporting multiple profiles for consumer both within and across different industries.

Consumer Profile Location table

The Consumer Profile Location [sn_csm_consumer_profile_location] table stores the relationship between the consumer profiles and locations.

Starting with the Vancouver release, the Consumer Profile Location [sn_csm_consumer_profile_location] table was introduced. By using this table, you can enhance your consumer profiles to support multiple addresses. Adding this functionality enables the

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relationship between the consumer profiles and locations, which enables various industries to manage multiple addresses for the individual profiles.

If you are a user with one of the sn_crm_foundation_admin, sn_crm_foundation_data_manager, sn_crm_consumer_relationship_data_manager, or sn_crm_consumer_data_manager roles, you can create, update, view, and delete the relationship between the consumer profiles and locations in the Consumer Profile Location table. If you are a user with one of the sn_crm_consumer_viewer, sn_crm_household_viewer, or sn_crm_foundation_data_viewer roles, you can view the records in the Consumer Profile Location table.

Consumer Profile Location table fields

Field	Data type	Description
Consumer profile	Reference	Profile that is associated with a consumer.
Location	Reference	Locations detail that is associated with the consumer.
Location type	List	Type of location that this record represents such as billing, shipping, and mailing. **Note:** You can associate a consumer profile location record with one or multiple location types.
Active	True/False	Status of the consumer profile-address mapping. **Note:** By default, the active field is set to **True**, but you can disable the Consumer Profile Location linkage by setting it to **False**.

Associating locations to consumer profiles

By enabling relationships between consumer profiles and locations across industries such as Financial Services Operations, Healthcare and Life Sciences, and Public Sector Digital Services Core, multiple consumer profiles can be associated with their corresponding addresses in the Customer Service Management (CSM) application.

Overview of consumer profiles

Individual consumer profiles can be associated with multiple locations, or multiple consumer profiles can be linked to the same location by using consumer profile locations. That means that different industries can associate consumer profiles with multiple locations and location types. The Customer Service Management (CSM) application supports the consumer profile

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(sn_csm_consumer_profile) table with a reference to the consumer (csm_consumer) table that helps to define and support consumer profiles.

Use case

For example, in the Healthcare and Life Sciences industry, clinicians must be able to store multiple addresses for patients, like mailing addresses for sending reports and home addresses for sample collections. Similarly, in the Financial Services Operations industry, financial institutions must store multiple addresses, such as mailing addresses for important documents and work addresses for billing purposes, for their customers.

In some scenarios, business-to-consumer (B2C) customers may have multiple addresses that can be used across their profiles for various purposes, serving as distinct addresses. For example, a customer's address could function as a shipping address for a Financial Services Operations profile, while simultaneously serving as a billing address for a Healthcare and Life Sciences profile.

Related topics

Associate an existing consumer location with a consumer profile

Create and associate a location to a consumer profile

Associate an existing consumer location with a consumer profile

Associate an existing consumer location with a consumer profile by using the Consumer Profile Location [sn_csm_consumer_profile_location] table in the Customer Service Management (CSM) application. By connecting consumer profiles and locations, industries can handle multiple addresses that are associated with individual profiles.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- admin

About this task

By using the Consumer Profile Location [sn_csm_consumer_profile_location] table, you can store the relationship between the consumer profile and location.

Procedure

1. In the navigation filter, enter `sn_csm_consumer_profile_location_list.do`.
2. In the Consumer Profile Locations record, select **New**.
3. In the **Location** field, select the lookup icon to open the list of locations.
4. Select the location to be associated with the consumer profile.
5. On the form, fill in the fields.
   For a description of the field values, see Consumer Profile Location table.
6. Select **Submit**.

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Result

A location has been added to the consumer profile. Additionally, you can include different addresses, like a mailing address or a shipping address, and associate them with the same consumer profile, depending on the use case.

Related topics

Create and associate a location to a consumer profile

Create and associate a location to a consumer profile

Create a location and associate it with the consumer profile in the Customer Service Management (CSM) application. With this functionality, you can create and associate multiple addresses to a consumer profile that serve other purposes.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- admin

About this task

Here's an example of why a user created and associated a location to the consumer profile. In the Healthcare and Life Sciences industry, clinicians can store multiple addresses for a patient profile, like mailing addresses for sending reports and home addresses for sample collections.

Procedure

1. In the navigation filter, enter `sn_csm_consumer_profile_location_list.do`.
2. In the Consumer Profile Locations record, select a consumer profile.
3. In the **Location** field, select the lookup icon to open the list of locations.
4. In the Consumer Profile Locations record, select **New**.
5. On the form, fill in the fields.

   Note: Ensure that you fill in the **Consumer** field in the Location form. If the **Consumer** field is empty, you get an error.

6. Select **Submit**.

   Note: If multiple consumer profile location records are associated with the location, you can't delete a location record.

   A new address is created and added to the **Location** field. You can associate this location to the consumer profile. For a description of the field values, see Consumer Profile Location table.

7. Select **Update**.

Related topics

Associate an existing consumer location with a consumer profile

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Configuring households

The household entity represents a group of consumers that usually share a common address and use services as a group.

A household is made up of consumers who have been added as members of that household.

Note: A household has an address and consumers have their own addresses. These addresses don't need to be the same to add a consumer as a member to a household.

With the household entity, you can:

- Create households and add consumers as household members.
- Create cases for households and household members.
- Create relationships between household members. These relationships authorize one household member to manage cases on behalf of another member.
- Create relationships between staff members and households or household members that enable the staff members to manage cases for those households and members.
- Track information for the households, including sold products, contracts, and entitlements.

Head of household

A household can have one member designated as the head of the household. A consumer who is added as the head of household is automatically added as a member of the household.

The head of household has access to all the cases and information for the household and the other household members. The head of household can also see:

- The sold products for the household.
- The sold products and install base items for household members.

Household information

Households can have multiple members. These members can be either consumers or consumer users. Consumers can also belong to multiple households.

Membership in a household is defined by the **Start Date** and **End Date** on the Household Member form. A household member is considered to be a current member if:

- The **Start Date** field is empty or is filled in with today's date.
- The **Start Date** field is filled in with a past date and the **End Date** field is empty or is filled in with today's date or a future date.

Only one record with current membership dates is enabled for each consumer in a household. A consumer can leave and rejoin a household multiple times. This information is recorded using the start and end dates.

As members are added or removed from a household, the member history is retained. You can find this information in the following related lists on the Household form.

- **Current Members**: The consumers currently in the household.
- **All Members**: The current and past members of a household. This list provides a history of the household. Members can appear multiple times in this list.

On the Household form, you can also find information about household cases and products in the following related lists:

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- **Cases**: The cases that have been created for all the members within a household
- **Sold Products**: The products owned by the household. These products can be owned or shared by multiple household members.

Household member relationships

The following types of relationships can be created for households and household members. These relationships are included in the following related lists on the Household form:

- **Member Relationships**: Relationships that have been established between household members. These relationships are created using the Authorized Representative responsibility. Household members that have an Authorized Representative relationship with another household member can act on behalf of that member and can manage cases and information for that member.
- **Household Team**: Relationships that have been established between an agent and a household. These relationships are created using the Relationship Manager responsibility. Agents with a Relationship Manager role for a household can access all cases linked to that household.

Consumer relationships

The following types of relationships can be created for consumers.

- **Consumer Relationships**: Relationships that have been established between two consumers, regardless of household. These relationships are created using the Authorized Representative responsibility. Consumers that have an Authorized Representative relationship with another consumer can manage cases for that consumer.
- **Consumer Team**: Relationships that have been established between an agent and a consumer. These relationships are created using the Relationship Manager responsibility. Agents with a Relationship Manager role for a consumer can access all cases linked to that consumer.

Activate customer household data model

Activate the Customer Household Data Model plugin to manage customer service for households.

Before you begin

Role required: admin

About this task

The CRM Household Entities plugin (com.snc.household) enables you to create households, define the members of a household, and identify relationships between household members. This plugin automatically activates the CRM Base Extension Entities plugin (com.snc.cs_base_extension), which provides granular access control through relationships, user profile attributes, and roles.

Note: Starting with the Australia release, the CRM Household Entities plugin (com.snc.household) has been migrated to the ServiceNow Store as a standalone application. Any new enhancements to this application are delivered through the Household store app. This change provides improved packaging, versioning, and deployment flexibility for business-to-consumer (B2C) implementations that require household relationship management.

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the CRM Household Entities plugin (com.snc.household).
3. Select **Activate**.

Related topics

Activate business locations

Create or update a household

Create or update a household.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_household_data_manager
- sn_crm_household_relationship_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice_manager
- admin

About this task

A household is made up of a group of consumers who live at a common address and share products and services. A household can have a designated head of household and multiple current members. The head of household has access to all the cases and information for the other household members.

A user with the administrator role can create a household. This user can also delete a household. When a household is deleted, the system removes its references and associations—including members, sold products, cases, and work orders—but doesn't delete the associated entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Customers** > **Households**.
2. Select **New** on the Households list.
3. Fill in the fields on the Household form.
4. Select **Submit**.
   The household is added to the Households list.

Related topics

Configuring households

Service Model Foundation relationships

Add consumers to a household

Add consumers as members of a household.

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Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_household_data_manager
- sn_crm_household_relationship_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice_manager
- admin

About this task

You can add existing consumers from the Consumer table to a household.

- A household can have multiple consumers.
- A consumer can belong to multiple households. One household can be designated as the primary household for that consumer.

Household member records are added to the Household Member table. When a consumer is added to a household, the consumer is assigned as a unique household member number that begins with the prefix HM.

The Household form includes the following related lists for household members:

- Current Members: Consumers that belong to the household as of the current date.
- All Members: Current members and past members. The customer service manager or admin can indicate that a consumer no longer belongs to the household by adding a date to the **End Date** field. A consumer that has left a household can be added back to that household.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Households**.
2. Select a household.
3. In the Current Members related list, select **New**.
4. Add a user from the Consumer table in the **Consumer** field.
   The **Household** field is automatically updated with the household selected in step 2.
5. **Optional:** If desired, add the date that the consumer was added to the household in the **Start Date** field.
   If the consumer is removed from the household, you can add the **End Date** field.
6. Select **Submit**.
   The consumer is added to the Current Members related list.

   On the Consumer form for this consumer, the household is added to the following related lists:

   - Current Households
   - All Households

   Note: You must configure the Consumer form to display these related lists. For more information, see Configure Service Model Foundation.

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Create a relationship between household members

Create a relationship between two consumers who are current members of the same household.

Before you begin

Role required: One of the following roles:

- sn_crm_household_relationship_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin
- sn_customerservice_manager
- admin

About this task

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a relationship between two consumers in a household, use the Authorized Representative responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Households**.
2. Select a household.
3. In the Member Relationships related list, select **New**.
   This related list shows the current relationships that exist between consumers in this household. When you select **New**, a new Household Member Relationship is displayed with the **Household** field already filled in.
4. In the **Consumer is** field, select the consumer in the household to fulfill the responsibility on behalf of another consumer within the same household.
5. In the **Responsibility** field, select the **Authorized Representative** responsibility.
6. In the **of Consumer** field, select the consumer who is being represented by the consumer in the **Consumer is** field.
7. In the **Type** field, select the type from the list of related party configurations and the **Order** field specifies the sequence in which records are displayed, organized according to business preferences.

   Note: Starting with the Yokohama release, the **Type** field is added to the Consumer Relationships form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.

8. Select **Submit**.
   The relationship is added to the Member Relationships related list.

Assign a team member to a household

Assign a team member to a household by selecting an employee. You can then select the employee's role or responsibility in the Customer Service Management (CSM) application.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager

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- sn_crm_household_relationship_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_customerservice_manager
- admin

About this task

If you're the administrator or a customer service manager, you can assign a team member to a household from the Current Members related list.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Households**.
2. Select a household.
3. From the Household Team related list, select **New**.
4. On the form, fill in the fields.

Household Team Member form fields

Field	Definition
Household	Household that the user is assigned to.
User	Employee selected to fulfill the role or responsibility.
Type	Defines the label for the relationship with the selected user. You can select the type from the list of related party configurations. **Note:** Starting with the Zurich release, the **Type** field is added to the Household Team Member form. For more information on how to populate the **Type** field for existing data, see Populate the Type field in relationship tables using the fix script.
Responsibility	Role or responsibility selected for this user.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.

Create and manage cases for a consumer or household

Staff members with the location agent role can create and manage cases for consumers and households.

Before you begin

Role required: sn_customerservice.svc_location_agent, sn_customerservice.svc_location_consumer_agent, sn_customerservice.svc_location_manager

About this task

Staff members at a business location who have either the location agent or consumer location agent role can create cases for households and consumers.

Staff members or internal users who have a relationship with a household (based on the Relationship Manager responsibility) can create cases for that household and its members. Users with relationships to a household are listed in the following locations:

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- The Household Team related list on the Household form.
- The Household Team Members list.

Relationship managers can perform the following actions on the cases that they can access:

- Add comments and work notes.
- Add attachments.
- Close cases.

When a consumer case is created or updated, the consumer receives an email notification. If a household is added to a case, the head of household is also notified when the case is created or updated.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** and select **Create New**.
2. **Optional:** Select the type of case that you want to create.
3. Perform one of the following actions.

Option	Description
Add a consumer.	Select a consumer in the **Consumer** field. ○ If the consumer belongs to only one house hold, the **Household** field is automatically updated. ○ If the consumer belongs to more than one household, select a household from the households that a consumer belongs to in the **Household** field. ○ If the consumer doesn't belong to a house hold, you can leave the **Household** field empty.
Add a household.	Select a household in the **Household** field. ○ If the household only has only one current member, the **Consumer** field is automatical ly updated. ○ If the household has multiple current mem bers, select a consumer from the house hold members in the **Consumer** field.

4. Fill in the remaining fields on the Case form.
5. If desired, add other members of the household to the watch list.
   If a user with a Relationship Manager relationship is creating a case for a household or household member, this user is automatically added to the watch list.
6. Select **Submit**.
   The case is added to the Cases related list on the Household form.

Related topics

Service Model Foundation cases

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Create entitlements for a household

Create entitlements for a household so that all household members are covered under the same terms and conditions.

Before you begin

Role required: sn_customerservice_manager, admin

About this task

Administrators and customer service managers can create entitlements for a household. These entitlements apply to the current members of that household.

When a case is created for a household or a consumer, the **Entitlement** field on the Case form lists the available entitlements:

Entitlements listed based on field types

If these fields are filled in	The Entitlement field lists these entitlements
Household and Consumer	Entitlements for both the consumer and household.
Household	Entitlements for the household.
Consumer	Entitlements for the consumer

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Entitlements**.
2. Select **New**.
3. Select a household in the **Household** field.
   When you select a household, the head of household is automatically added to the **Consumer** field.

   Note: You must configure the form layout and add the **Household** field.

4. **Optional:** If desired, select a different household member in the **Consumer** field.
5. Fill in the remaining fields on the Entitlement form.
   For more information, see Create entitlements for CSM entities.
6. Select **Submit**.
   The entitlement is added to the Entitlements related list on the Household form.

Create service contracts for a household

Create service contracts for a household so that all household members are covered under the same terms and conditions.

Before you begin

Role required: sn_customerservice_manager, admin

About this task

Administrators and customer service managers can create contracts for a household. These contracts apply to the current members of that household.

When a case is created for a household or a consumer, the **Contract** field on the Case form lists the available contracts:

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- If the **Household** and **Consumer** fields are filled in, the **Contract** field lists the contracts for both the consumer and household.
- If only the **Household** field is filled in, the **Contract** field lists the contracts for the household.
- If only the **Consumer** field is filled in, **contracts** field lists the contracts for the consumer

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Service Contracts**.
2. Select **New**.
3. Select a household in the **Household** field.
   When you select a household, the head of household is automatically added to the **Consumer** field.

   Note: You must configure the form layout and add the **Household** field.

4. **Optional:** If desired, select a different household member in the **Consumer** field.
5. Fill in the remaining fields on the Contract form.
   For more information, see Create service contracts.
6. Select **Submit**.
   The contract is added to the Contracts related list on the Household form.

Consumer Service Portal changes

Activating the Customer Household Data Model plugin lets you view households and their members on the Consumer Service Portal, and also view or create cases for household members.

Viewing multiple households on the portal

Consumers can belong to multiple households and can have one primary household. When the Customer Household Data Model plugin is activated, consumers who are logged in to the Consumer Service Portal can see the following information on their user profile page:

- The consumer's primary household in the **Primary Household** field.
- The households that the consumer belongs to in the Households list.

Viewing household members on the portal

For consumers who are the head of household, the Support menu includes the **Household Members** menu item, which lists all current members of the household.

Selecting this menu item displays a page that lists the members of the households where the logged-in consumer is the head of the household.

Creating cases for other members of a household or other consumers

A consumer can create cases for another consumer in the following instances:

- A consumer who is the head of a household can create cases for other members of the household.
- A consumer who is an authorized representative for another consumer can create cases on behalf of that consumer.

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When creating a case, the head of household or authorized representative can select the household member in the **Consumer** field on the record producer.

- If the logged-in consumer belongs to only one household, the household is automatically added to the case when it's submitted.
- If the logged-in consumer belongs to more than one household, the correct household can be selected in the **Household** field on the record producer.
- If the household is selected first, the consumers listed in the **Consumer** field are restricted to the current members of the household.

The default selections for the **Household** and **Consumer** fields on the record producer include the primary household and the logged-in consumer.

Viewing and updating cases on the portal

The logged-in consumer can see the following cases on the portal:

- All Cases: Cases that belong to their household or that belong to consumers with which they're an authorized representative.
- My Cases: Cases created by the logged-in consumer.

The head of household or authorized representative can perform the following actions for the cases that belong to their household:

- Add comments and attachments.
- Accept or reject a solution.
- Close a case.

Consumer case information

When the Customer Household Data Model plugin is activated, the Ticket Fields details tab includes the **Consumer** field.

Billing accounts

Billing Account Core application provides a foundational data model for managing billing accounts across organizations and users. It enables businesses to define, organize, and maintain billing relationships, supporting accurate billing, payments, and scalable financial operations.

Billing account overview

A billing account is a centralized record that manages payment and invoicing for services. Use billing accounts to organize billing schedules, payment profiles, addresses, currency settings, and to link billing to your customers—individuals or organizations.

Unlike a customer account, which represents the organizational relationship, a billing account is a financial entity specifically for managing billing and payments. A single customer can have multiple billing accounts for different billing arrangements, and you can consolidate charges from multiple accounts under a single parent billing account. Billing accounts support both B2B and B2C scenarios, including complex structures modeled through parent-child hierarchies.

Billing Account Core (sn_billing_account) is a foundational data model application with no standalone navigation — you work with billing accounts within Customer Service Management. The core tables, fields, billing schedules, and platform roles are available with Billing Account Core. The capabilities that connect a billing account to a customer require the CSM plugins `com.sn_customerservice` and `com.snc.cs_base`. These plugins provide the account,

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contact, and consumer relationships, related parties, the Address Type field, and the CRM and customer access management (CAM) roles.

Simple use case

A telecommunications customer subscribes to mobile, broadband, and streaming services. Rather than tracking three separate charges, you create one billing account for the customer and:

- Associate the service location as the billing address.
- Add a monthly billing schedule so invoices generate on a regular cycle.
- Add a payment profile with a direct-debit method so that charges are collected automatically.

If a parent company pays the customer's charges, set the paying party to Parent and select the paying billing account. The result is a single record that answers who is billed, for what, when, and how they pay.

Key capabilities

- Billing schedule: Define billing frequency (monthly, quarterly, annual) and billing cycles.
- Bill-to address and currency: Specify invoice delivery address and billing currency.
- Customer associations: Link billing accounts to customers, contacts, and households.
- Hierarchy support: Create parent-child structures for consolidated billing, sub-accounts, or delegated payment responsibilities. The billing account hierarchy visualization shows these relationships as a tree on the billing account form so that you can review the structure and move between related billing accounts without leaving the record.

  You can view and navigate these relationships from the billing account form. The hierarchy appears following the Description field on the Default and Case views. It shows the parent billing account, the child billing accounts, and identifies the billing account you're currently viewing. From the hierarchy, you can:

  - Expand or collapse nodes to show or hide child billing accounts.
  - Select a billing account in the tree to open that record.

When to use billing account

Use billing accounts when your organization needs to:

- Separate billing from customer relationship management
- Support multiple billing arrangements for a single customer
- Consolidate charges from multiple business units, geographies, or product lines
- Manage payment responsibility separately from service consumption
- Track billing-related cases and interactions distinct from general customer cases

Related topics

Data management for Customer Service Management

Configuring billing accounts

Configure billing accounts by reviewing the billing account model, setting up billing account records, and granting related parties access through customer access management.

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Understand the billing account model

Topic	Description
	Review the entities, relationships, and business models that the billing account data model adds to the Customer Data Foundation.
Billing account tables and plugins	Review the tables that the Billing Account Core application adds or uses, and the applications required.
Roles installed with billing accounts	Review the granular roles installed across the platform, CRM, and customer access management families.

Set up billing accounts

Task	Description
Install billing account	Install the Billing Account Core application.
Associate a location with a billing account	Add one or more addresses to a billing account and mark one as the primary address.
Set up payment details for a billing account	Define the paying party and the payment profile for a billing account.
Set up a billing schedule for a billing account	Define the billing frequency and cycle on the platform schedule.
Add related parties to a billing account	Grant additional users tracking or access to a billing account.

Grant related-party access

Related-party access to billing accounts runs on customer access management. Configure it with the following tasks:

Task	Description
Create a responsibility definition	Define the responsibility that grants related-party access to a billing account.
Creating a responsibility access configuration	Configure how related parties are granted access to a billing account.

Install billing account

You can install the Billing Account Core (sn_billing_account) application if you have the admin role.

Before you begin

Role required: admin

About this task

The billing account core application has a modular plugin structure:

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- Base plugin (sn_billing_account): Independent core functionality for billing account management
- CSM integration: Install com.sn_customerservice and com.snc.cs_base to enable billing account integration with core CSM capabilities and the related party framework

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Billing Accounts**.
2. Select **New** from the billing accounts record.
3. Fill the required details on the billing account form.
   For more information, see Billing Account form.
4. Select **Submit** to create billing account record.

   You can create a billing account directly from an account or consumer record by using the **Billing Accounts** related list. When you create a billing account this way, the source **Account** or **Customer** and the **Billing account type** are set automatically.

Billing account tables and plugins

Lists the tables that the Billing Account Core application adds or reuses, and the applications required to enable billing accounts.

Tables

Table	Table name	Added or reused	Dependency
Billing Account	`sn_billing_account_billing_account`	Added	Billing Account Core
Billing Account Address	`sn_billing_account_address`	Added	Billing Account Core (the Address Type field requires the CSM plugin)
Billing Account Payment Profile	`sn_billing_account_payment_profile`	Added	Billing Account Core
Billing Account Related Party	`sn_billing_account_related_party`	Added	Requires the CSM plugin
Schedule	`cmn_schedule`	Reused	Platform
Schedule Entry	`cmn_schedule_span`	Reused	Platform
Location	`cmn_location`	Reused	Platform

Applications

Application	ID	Purpose
Billing Account Core	`sn_billing_account`	Adds the billing account data model. Required.
Customer Service Management	`com.sn_customerservice`, `com.snc.cs_base`	Enables the CSM dependent capabilities: the account, contact, and consumer relationships, related parties, and the Address Type field.

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Activation

The payment profile and billing schedule fields appear on the existing billing account tables, so no net-new plugin is required. Ensure that Billing Account Core is up to date. The billing schedule is built on the platform Schedule data model.

Related topics

Billing accounts

Roles installed with billing accounts

Roles installed with billing accounts

The Billing Account Core application installs granular roles across three families: platform, CRM, and customer access management. Users inherit these granular roles through the functional or persona roles assigned to them.

How billing account roles are used

The billing account roles are granular roles that act as the role condition on the application's ACLs. You don't assign a granular role to a user directly. Instead, a functional or persona role that is enabled for the responsibility framework contains the granular roles, and users inherit them. On its own, a granular role has no effect. The customer access management roles additionally drive related-party access through the declarative responsibility framework.

Platform granular roles

Platform granular roles provide access to the base billing account data.

Role	Role name
Billing Account Viewer	`sn_billing_account.viewer`
Billing Account Writer	`sn_billing_account.writer`
Billing Account Data Manager	`sn_billing_account.data_manager`
Billing Account Administrator	`sn_billing_account.admin`
Billing Account API Integration	`sn_billing_account.ws_integration`
Billing Account Schedule Viewer	`sn_billing_account.schedule_viewer`
Billing Account Schedule Writer	`sn_billing_account.schedule_writer`

CRM granular roles

CRM granular roles provide access to CRM billing account data and are inherited by CRM persona roles.

Role	Role name
CRM Billing Account B2B Viewer	`sn_billing_account.crm_b2b_viewer`
CRM Billing Account B2C Viewer	`sn_billing_account.crm_b2c_viewer`
CRM Billing Account B2B Writer	`sn_billing_account.crm_b2b_writer`
CRM Billing Account B2C Writer	`sn_billing_account.crm_b2c_writer`

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Role	Role name
CRM Billing Account Data Manager	`sn_billing_account.crm_data_manager`
CRM Billing Account Administrator	`sn_billing_account.crm_admin`

Customer access management granular roles

Customer access management granular roles grant related parties access to billing accounts through the responsibility framework.

Role	Role name
Billing Responsibility Granular	`sn_billing_account.resp_granular`
Billing Authorized Contact	`sn_billing_account.authorized_contact`
Billing Authorized Consumer	`sn_billing_account.authorized_consumer`

Related topics

Granular roles and entities for responsibility framework

Billing accounts

Add related parties to a billing account

Create a responsibility definition

Creating a responsibility access configuration

Add related parties to a billing account

Extend billing account access to additional customers or stakeholders by configuring billing account related parties. Related parties enable you to define relationships between billing accounts and other entities such as contacts, consumers, or accounts.

Before you begin

Confirm that the following prerequisites are in place:

- A billing account record exists
- The contact, consumer, or account record you want to add as a related party exists

Role required: sn_billing_account.crm_b2b_writer or sn_billing_account.crm_b2c_writer, or a role that contains them (sn_billing_account.crm_data_manager or sn_billing_account.crm_admin). The unrestricted billing account roles (sn_billing_account.writer, sn_billing_account.data_manager, sn_billing_account.admin) also apply.

About this task

Billing account related parties use the customer access management (CAM) responsibility framework to extend record-level access to a billing account. A related party is one of two kinds:

- **Authorized party** - an account, contact, or consumer that is granted access to the billing account through a responsibility. The base system delivers this access with responsibility access configurations (RACs) and CAM granular roles.
- **Listed party** - an account, contact, or consumer that is recorded on the billing account for reference only, without access.

For how the responsibility framework, granular roles, and query rules work together, see Granular roles and supported entities for customer access management.

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Billing Accounts**.
2. Select a billing account from the list.
   For more information on how to create billing account record, see Install billing account.
3. Select **New** from the Billing Account Related Party related list.
4. On the form, fill in the fields.

Billing Account Related Party form

Field	Definition
Type	Relationship type of the related party. Authorized types (such as authorized account, authorized contact, and authorized consumer) grant the party access to the billing account through a responsibility. Listed types record the party for reference only, without access.
Billing account	Billing Account to which this related party belongs.
Account	Customer account associated with the billing account
Contact	Customer contact associated with the billing account
Consumer	Consumer associated with the billing account
Order	Sequence or priority of the party.
Responsibility	Responsibility that grants the related party access to the billing account through the CAM responsibility framework. For authorized parties, the base system provides responsibilities such as billing authorized account, billing authorized contact, and billing authorized consumer. These responsibilities grant read access to the billing account and its addresses. The **Responsibility** field is left empty for any listed party type, such as listed account, listed consumer, and more.

5. Select **Submit** to create billing account related party record.

Related topics

Granular roles and entities for responsibility framework

Create a responsibility definition

Creating a responsibility access configuration

Configure access through the responsibility access configuration

Associate a location with a billing account

Associate one or more locations with a billing account by creating billing account address records. Each billing account address links a billing account to a location and identifies the type of address.

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Before you begin

Role required: sn_billing_account.crm_b2b_writer or sn_billing_account.crm_b2c_writer, or a role that contains (sn_billing_account.crm_data_manager or sn_billing_account.crm_admin). The unrestricted billing account roles (sn_billing_account.writer, sn_billing_account.data_manager, sn_billing_account.admin) also apply.

About this task

A billing account address [sn_billing_account_address] table links a billing account to a location and identifies the type of address using the available location types. Associating locations with a billing account gives you a structured record of where an account operates. You can maintain more than one address per account and mark one as the primary. This keeps address information consistent and reusable across the customer data model.

Verify the following prerequisites are in place:

- A billing account record exists.
- The location record that you want to associate with the billing account exists.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Billing Accounts**.
2. Select a billing account from the list.
   For more information on how to create a billing account record, see Install billing account.
3. Select **New** from the Billing Account Addresses related list.
4. On the form, fill in the fields.

Billing Account Address form

Field	Definition
Billing account	Billing account that this address is associated with.
Location	Location record associated with the billing account. References the Location (cmn_location) table.
Type	Type of address for the billing account. The available values are the configured location types.
Primary	Indicates whether this is the primary address for the billing account.
Active	Indicates whether the billing account address record is active.

5. Select **Submit** to create the billing account address record.

Set up payment details for a billing account

Set up payment details for a billing account by defining the paying party on the account and adding a payment profile. The paying party settings capture who is responsible for payment; the payment profile records how the account is paid, including the payment method. Payment profiles are stored in the Billing Account Payment Profile table.

Before you begin

Role required: sn_billing_account.crm_b2b_writer or sn_billing_account.crm_b2c_writer, or a role that contains them (sn_billing_account.crm_data_manager or sn_billing_account.crm_admin). The unrestricted billing account roles (sn_billing_account.writer, sn_billing_account.data_manager, sn_billing_account.admin) also apply.

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About this task

A payment profile [sn_billing_account_payment_profile] table defines how a billing account is paid, including the payment method and any related payment details. Together with the paying party settings on the billing account, it captures who is responsible for payment — the account itself, a parent, or another designated billing account. Adding payment profiles helps your organization manage payment responsibility accurately across billing relationships and account hierarchies.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Billing Accounts**.
2. Select a billing account from the list.
   For more information on how to create a billing account record, see Install billing account.
3. On the billing account form, define the paying party for the account.

Billing account paying party fields

Field	Definition
Paying party	Identifies the party responsible for paying. The available values are: ○ None: No paying party is assigned. This is the default value until you select another option. ○ Self: The billing account pays its own charges. When you select this value, the **Paying billing account** field is set to the current account automatically. ○ Parent: A self-paying account higher in the billing account hierarchy pays the charges. ○ Designated: A billing account that you specify pays the charges. In the **Paying billing account** field, you can select any account of the same billing account type.
Paying billing account	Lists accounts of the matching billing account type (for example, Customer account).

4. Select **New** from the Billing Account Payment Profiles related list.
5. On the form, fill in the fields.

Billing Account Payment Profile form

Field	Definition
Payment method	Payment method for the profile. The available values are: ○ Invoice: The account is billed by invoice and settles against it. ○ Direct Debit: Payments are collected automatically by direct debit; selecting this value enables **Payment method type** and **Payment reference ID**.
Billing account	Billing account that this payment profile belongs to.
Payment method type	Type of payment method. The available values are Card and Bank transfer. This field is available when Payment method is Direct Debit.

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Field	Definition
Payment reference ID	Reference identifier for the payment method. This field is available when Payment method is Direct Debit.
Active	Indicates whether the payment profile is active. Selected by default.

6. Select **Submit** to create the billing account payment profile record.

Set up a billing schedule for a billing account

Set up a billing schedule for a billing account to define when billing occurs. A billing schedule uses the platform schedule and schedule entry records and is linked to the billing account through the billing schedule field.

Before you begin

Role required: sn_billing_account.schedule_writer, or a billing account role that contains it, such as sn_billing_account.crm_b2b_writer, sn_billing_account.writer, sn_billing_account.data_manager, or sn_billing_account.admin.

Note: Users with sn_billing_account.schedule_viewer role have read-only access to the schedule.

About this task

A billing schedule is a schedule (cmn_schedule) record made up of one or more schedule entry (cmn_schedule_span) records that define the billing periods. When you create a schedule from a billing account, the schedule **Type** is automatically set to **Billing Account**.

Each billing account uses a single billing schedule. You can reuse the same schedule for more than one billing account. However, if a schedule is shared, an information message appears on both the billing account and the schedule.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Billing Accounts**.
2. Select a billing account from the list.
   For more information on how to create a billing account record, see Install billing account.
3. In the **Billing schedule** field, create a schedule or select an existing one.

   For more information about the fields on the schedule form, see Schedule fields.

   Billing schedule fields

Field	Definition
Billing Schedule	Schedule (cmn_schedule) record that defines the billing periods for the billing account. **Note:** The **Billing schedule** field lists only schedules whose **Type** is Billing Account. Because the Schedule (cmn_schedule) table is shared across the platform, the **Type** field identifies which schedules belong to billing accounts. If you select a schedule that another billing account already uses, an information message indicates that the schedule is shared.

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4. Add schedule entry (cmn_schedule_span) records to the schedule to define the individual billing periods.
5. Save the billing account to associate the billing schedule with the record.

User management

Configure the internal and external users for Customer Service Management to provide the correct access to features, capabilities, and case data. Create relationships that facilitate case management and fulfill support roles for specific accounts.

Setting up users, user groups, and customer relationships

Task	Description
Configure users and groups	Configure the individual users and the user groups who can access your instance.
Assign roles to CSM users	Assign roles to individual users and user groups to control access to features, capabilities, and data.
Create multiple consumer profiles for a user	Individual consumers can have multiple profiles for different needs. You can create these profiles to identify and differentiate profile-specific data.
Configure a unified user	Enable users to maintain multiple profiles within the Customer Service Management (CSM) application and other ServiceNow applications with one login.
Create customer relationships	Establish different types of relationships between partners, customers, and contacts, to make case and account management easy and flexible: • Bi-directional account relationships • Contact relationships • Account hierarchies
Create account teams	Create teams made up of employees and customer contacts who fulfill the roles and functions to support specific accounts.
Configure Contributor Users	Configure contributor users to engage middle office teams in resolving customer issues and requests.
Configuring customer access management	Configure customer access management to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case.
Fix external user role assignments	Fix the issue with external users assigned with internal user roles.

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Configure users and groups

A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members.

Before you begin

Role required: import_admin, user_admin, and sn_crm_foundation_admin

About this task

Group information is used across most processes in the *ServiceNow AI Platform*. You can use it for assigning work to teams and requesting approvals.

Any rule that is applied to a group is automatically assigned to group members; for example, roles and assignment rules.

Procedure

- You can import existing users and groups using guided setup.
- You can create users and groups using the *ServiceNow AI Platform* user administration feature.
  - Create a user
  - Create a user group
  - Add a user to a group

Assign roles to CSM users

Roles control access to features, capabilities, and data in the Customer Service Management application.

Before you begin

Role required: import_admin, user_admin, and sn_crm_foundation_admin

Before you can assign roles to your users, make sure that these users have already been configured.

- Configure users and groups
- Configure accounts and contacts
- Configure consumers

About this task

You can assign roles to individual users or groups. Apply roles to groups and the members of those groups inherit those roles.

The Customer Service Management application provides two types of roles: internal roles for agents and managers and external roles for customers, customer partners, and consumers.

Internal and External roles for Customer Service Management

Internal Roles	External Roles
Business-to-business (B2B) • sn_customerservice_agent • sn_customerservice_manager	**Business-to-business (B2B) Customer** • sn_customerservice.customer • sn_customerservice.customer_admin • sn_customerservice.customer_case_manager

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Internal and External roles for Customer Service Management (continued)

Internal Roles	External Roles
	Business-to-business (B2B) Partner • sn_customerservice.partner • sn_customerservice.partner_admin
Business-to-consumer (B2C) • sn_customerservice.consumer_agent • sn_customerservice_manager **Note:** Assigning a consumer role without a linked consumer record prevents the user from performing consumer activities. You can create the consumer record by navigating to **All** > **Customer Service** > **Customer** > **Consumers** before assigning the role.	**Business-to-consumer (B2C)** sn_customerservice.consumer **Unified Consumer** sn_customerservice.unified_consumer

Procedure

- You can assign roles to users and groups using guided setup.
- You can also assign roles to users and groups using the *ServiceNow AI Platform* user administration feature.
  - Assign a role to a user
  - Assign a role to a group

Related topics

Roles installed with Customer Service Management

Configuring a Unified User

By unifying multiple profiles for a single user in the Customer Service Management (CSM) application, you don't need to create and manage multiple user accounts for that user.

A user can maintain multiple profiles within the Customer Service Management (CSM) application and other ServiceNow applications with one login.

Use cases

In the past, customers had to create multiple user records for a user who had different roles on different applications. For example, let's say that you have a CSM user who is both an internal employee and an external consumer. With a unified profile, your user can switch between different user records and seamlessly transition between roles.

By using multiple profiles within the CSM application, your organization can have these different profiles:

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- Internal and external CSM profiles for the same user where that user has both internal and external accounts. For example, in a financial institution, a consumer might be an employee of a bank and at the same time hold a personal account in the same bank.
- Multiple external profiles for a CSM user where a user has multiple external accounts. For example, a consumer might have a patient profile in Healthcare and Life Sciences and also have a constituent profile in Public Sector Digital Services.
- Multiple profiles with the CSM and other ServiceNow® applications where a user has multiple accounts within CSM and other ServiceNow applications. For example, a user might have a CSM account for vendor support and a VRM account for vendor risk management.

Key benefits

- Improved user experience. A unified user can navigate between internal and external roles without switching profiles.
- Enhanced admin efficiency. Your organization can streamline the administrative processes so that you don't have to manage multiple user accounts for individuals with various profiles or roles.
- Increased customer satisfaction. Your organization can offer a consistent service to your customers across different roles, which could lead to increased customer loyalty and positive feedback.

Related topics

Configuring a user as a Unified Consumer

Configuring a contact as a consumer

Update system property

Configuring a user as a Unified Consumer

By creating a unified profile, you can integrate both internal and external personas or consumers in your organization. A user who has a unified profile has synchronized user's login interactions across the Customer Service Management (CSM) application.

Overview of Unified Consumer

Before a unified profile was available, a platform user could only hold either an snc_internal or an snc_external role, but not both roles due to role collision issues. Modeling a user as both an employee and a consumer wasn't possible in the past because the sn_customerservice.consumer role inherited the snc_external role. Role inheritance was combined with the platform’s behavior to avoid role collisions, which could otherwise restrict users from performing internal duties while also acting as a consumer.

With this new unified user functionality, a single user who is an employee (snc_internal) can also be a business-to-consumer (B2C) customer. With a unified profile, your user can switch between different user records and seamlessly transition between roles.

For example, in a financial institution, an individual could be both an employee and a personal account holder. Similarly, in the telecommunications industry, an internal employee might also use company voice services for personal use.

Requirements for Unified Consumer

A functional Unified Consumer requires:

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- A record in the Consumers [csm_consumer] table linked to the user.
- The Unified Consumer (sn_customerservice.unified_consumer) role assigned to the user.

Note:

Create the consumer record before assigning the role. Missing either component prevents the user from accessing consumer functionality such as cases, sold products, or install base items.

You can initiate this functionality by enabling the Case Management Core (com.sn_customerservice) plugin.

Using a query rules framework

You can use the Unified Consumer feature only within the query rules framework. For example, when you update a consumer record, the associated user records synchronize through a business rule *sync_consumer* to *csm_consumer_user* through a business rule. This synchronization occurs only if the associated user class has the *csm_consumer_user* record and not any other user record. When you modify the following fields for the consumer user, the associated records also automatically update:

- First name
- Middle name
- Last name
- Email
- Mobile phone
- Business phone
- Home phone

You can synchronize all types of user records by customizing the business rule. Apply it to the *sys_user* record instead of the *csm_consumer_user* record.

Related topics

Roles installed with Employee as a Consumer

Supported and unsupported roles and features

Setting up a user as a Unified Consumer

Roles installed with Employee as a Consumer

Use different roles to establish the relationships between your users and entities. By using the Employee as a Consumer functionality within the Customer Service Management (CSM) application, your organization can support both requesters and supporters.

Overview of Employee as a Consumer

The Unified Consumer (sn_customerservice.unified_consumer) role enables a user to have both the snc_internal and snc_external roles, which means that roles have greater control over consumer behavior, whether it's internal or external.

Earlier, the Consumer (sn_customerservice.consumer) role automatically included the snc_external role, which created a limitation. This limitation helped to prevent an organization from assigning the snc_internal role to a user and restricted the simultaneous use of both the snc_internal and snc_external roles. To address these limitations, a new role, independent of

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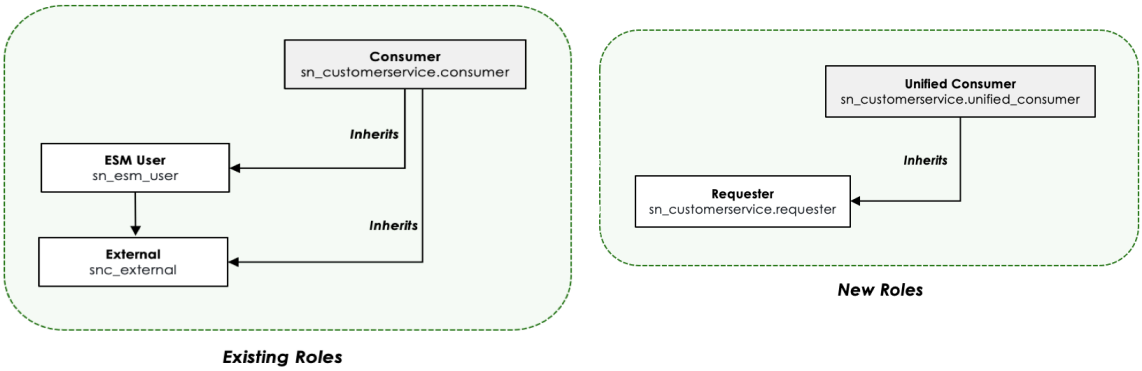
the snc_external role, was introduced to complement the sn_customerservice.consumer role. This additional role can be associated with both the snc_internal and snc_external roles, which means that your organization now has increased flexibility in managing a user's behavior.

Employee as a Consumer existing and new roles

The following diagram shows the existing roles and the new roles that enable the Employee as a Consumer functionality.

Existing and new roles



Note:

With the Employee as a Consumer functionality, the Requester (sn_customerservice.requester) and the Unified Consumer (sn_customerservice.unified_consumer) roles were introduced. Both these roles are independent of the snc_internal and snc_external roles.

In addition to the roles listed below, users functioning as consumers must have a linked record in the Consumers [csm_consumer] table. Without this record, consumer functionality is not available even with the appropriate role assigned.

Requester and Unified Consumer roles and descriptions

Role [name]	Description
Requester [sn_customerservice.requester]	Supports requesters and implements the base functionality. It serves as a base role, running in parallel with the Enterprise Service Management (ESM) User (sn_esm_user) role.
Unified Consumer [sn_customerservice.unified_consumer]	Supports consumers and runs parallel to the Consumer (sn_customerservice.consumer) role. It inherits the Requester (sn_customerservice.requester) role.

Related topics

Configuring a user as a Unified Consumer

Supported and unsupported roles and features

Setting up a user as a Unified Consumer

Supported and unsupported roles and features

Explore the capabilities and limitations of the unified consumer role (sn_customerservice.unified_consumer) to understand the roles and features it supports. This

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analysis helps you can enhance the user experience and streamline administration, supporting a unified identity across different user contexts.

Supported and unsupported roles and personas

Supported or unsupported	Persona and role [Role Name]	Internal role(s)	External role(s)	Description
Supported	Administrator	Admin [admin]		Administrators who can set up unified consumer users.
	Internal unified consumer	Internal employee [snc_internal] **Note:** Can have other internal roles across non-CSM applications.	Unified consumer [sn_customerservice.unified_consumer] **Note:** The unified consumer role doesn't contain snc_external roles.	An employee (internal user) who is also a consumer (external).
	External unified consumer		• Unified Consumer [sn_customerservice.unified_consumer] • External users [snc_external]	A user who is similar to a consumer [sn_customerservice.consumer], but has the unified consumer role.
Unsupported	Customer Service Management (CSM) fulfiller as a consumer	• Customer service manager [sn_customerservice_manager] • Relationship agent [sn_customerservice.relationship_agent] • Case task agent [sn_customerservice.case_task_agent] • Account customer agent [sn_acct_consumer.agent] • Location consumer agent [sn_customerservice.svc_location_consumer_agent] • Location agent [sn_customerservice.svc_location_agent]	Unified Consumer [sn_customerservice.unified_consumer]	A customer service agent who is also a consumer.

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Supported and unsupported roles and personas (continued)

Supported or unsupported	Persona and role [Role Name]	Internal role(s)	External role(s)	Description
		• Location manager [sn_customerservice.svc_location_manager] • Location relationship manager [sn_bus_loc.location_relationship_manager] • Customer service agent [sn_customerservice_agent] • Consumer service agent [sn_customerservice.consumer_agent]		
	CSM contributor as a consumer	• Account contributor [sn_customerservice.account_contributor] • Consumer contributor [sn_customerservice.consumer_contributor] • Relationship contributor [sn_customerservice.relationship_contributor] • Self-contributor [sn_customerservice.self_contributor] • Service organization contributor [sn_customerservice.service_organization_contributor] • Location manager contributor [sn_customerservice.svc_location_manager_contributor]	Unified Consumer [sn_customerservice.unified_consumer]	An employee (internal contributor) who can create cases on behalf of themselves and others, but is also a consumer.
	Employee as an account-consumer (B2B2C)	Internal employee [snc_internal]	Account consumer [sn_acct_consumer.consumer]	An employee who is also a consumer for a business-customer (B2B2C).

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List of supported features and flows for unified consumer

Features

• Case Management
• Case Tasks
• Install Base Management
• Inbound/Outbound Email Notifications
• Targeted Communications
• Service Catalog Product Case
• Consumer Profile and Consumer Profile Locations
• Household
• Case Application Programming Interface (APIs)
• Asset (IT Asset Management)
• Contracts and Entitlements
• Contracts on Sold Product or Install Base Items
• Virtual Agent or Agent Chat
• Live Agent Chat
• Look up and Verify
• Case Digest
• Case Escalations
• Case Types
• Case Playbooks for Complaint
• Case Playbooks for Onboarding
• Order Management
• Omnichannel Callback
• Engagement Messenger
• ServiceNow Voice for CSM
• Business Location
• Walk-up Experience for Customer Service Management
• Knowledge Management
• Communities
• CSM Integrations
  ○ Customer Service Management and Field Service Management Integration
  ○ Customer Service Management and Request Management Integration
  ○ Customer Service Management and Asset Management Integration
• Field Service Management

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List of supported features and flows for unified consumer (continued)

Features
○ Work Orders and Work Order Tasks ○ Appointment Booking ○ Conversational Appointment Booking

Related topics

Configuring a user as a Unified Consumer

Roles installed with Employee as a Consumer

Setting up a user as a Unified Consumer

Setting up a user as a Unified Consumer

Set up a user as a Unified Consumer by creating a single, unified profile that supports both the internal and external personas in the Customer Service Management (CSM) application.

Overview of Unified Consumer

You can model a single user both as an employee (snc_internal) and a business-to-consumer (B2C customer) by creating a unified profile. By unifying multiple profiles for a single user in the Customer Service Management (CSM) application, you don't need to create and manage multiple user accounts for that user.

Note: You can also configure an external Unified Consumer, who lacks an internal (snc_internal) role and isn't an employee, by using similar setup tasks.

The following table describes how to set up the tasks for activating a Unified Consumer.

Set up the tasks for activating a Unified Consumer

Task	Description
Activate a Unified Consumer	Activate a Unified Consumer by updating the `ConsumerImpl` script include to display other sys_user records in the reference list for the csm_consumer table. For more information, see Activate a Unified Consumer.
Create a consumer record	Create a consumer record with the user, designating that user as a consumer. For more information, see Create a consumer record.
Assign a role to a user	Assign the Unified Consumer (sn_customerservice.unified_consumer) role to the user. For more information, see Assign a role to a user.
Associate an existing user with a consumer record	Associate a Unified Consumer user with a consumer record by creating a consumer user and then linking the user with a consumer record. For more information, see Associate an existing user to a consumer record.

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Note: Both a consumer record and the Unified Consumer role are required for consumer functionality. Create the consumer record before assigning the role. If the role is assigned without a linked consumer record, the user cannot perform consumer activities and may experience unexpected behavior. If the consumer record exists but the role is missing, the user cannot access consumer features such as cases, sold products, or install base items.

Related topics

Configuring a user as a Unified Consumer

Roles installed with Employee as a Consumer

Supported and unsupported roles and features

Activate Unified Consumer

Activate the Unified Consumer functionality within the Customer Service Management (CSM) application by updating the *Consumer* script include. This modification enables you to display the other sys_user extension records in the reference list for the users in the csm_consumer table.

Before you begin

Role required: admin

About this task

To enable access to sys_users (internal users), add the sys_user to the user extension in the *Consumer* script include.

Procedure

1. Navigate to **All** > **System Definition** > **Script Includes**.
2. Open the *Consumer* script include and modify the script as follows:

   Add the **initialize** method to the *Consumer* script include and set **this.userExtensions** value.

```
var Consumer = Class.create();

Consumer.prototype = Object.extendsObject(ConsumerImpl, {
    initialize: function() {
        ConsumerImpl.prototype.initialize.call(this);
        this.userExtensions = ["csm_consumer_user",
 "sys_user"];
    },

    type: 'Consumer',

});
```

   Note: While creating a consumer user from the consumer form, you're redirected to the interceptor form to select the user type.

3. Select **Update**.

What to do next

Add a user to your instance. For more information, see Creating and associating a Unified Consumer user to a consumer record.

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Assign the Unified Consumer role to a user

Assign the Unified Consumer (sn_customerservice.unified_consumer) role to the sys_user to designate them as a consumer in the Customer Service Management (CSM) application.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. Select the user from the user record.
3. In the Roles related list, select **Edit**.
4. In the Collection list, select the Unified Consumer (sn_customerservice.unified_consumer) role and move it to the Roles list.
5. Select **Save**.

Result

The sys_user is assigned to a unified consumer role (sn_customerservice.unified_consumer).

What to do next

Create and associate a Unified Consumer user to a consumer record. For more information, see Creating and associating a Unified Consumer user to a consumer record.

Creating and associating a Unified Consumer user to a consumer record

Create and associate a Unified Consumer user with a consumer record so that your user can access the Customer Service Portal (CSP). This process involves creating a Unified Consumer user through a consumer form and then associating the user to a consumer record.

Create a Consumer User through a consumer form

Create a Consumer User through the User lookup list on the consumer form.

Before you begin

Role required: sn_crm_consumer_data_manager, sn_crm_consumer_relationship_data_manager, sn_crm_household_data_manager or sn_crm_household_relationship_data_manager or sn_crm_foundation_data_manager, sn_crm_foundation_admin or admin

About this task

You can create both the internal (snc_internal) and external (snc_external) users.

Note: Only administrators can associate a sys_user with a consumer, and each user can be associated with only one consumer.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the consumer from the consumer record.
3. In the Login Details related list, select the User lookup icon to open the list of sys_users.
4. On the Users list, select **New**.

   Note: If the unified consumer isn't configured, the system redirects to the consumer user form. If other user extensions are configured, it redirects to the interceptor, enabling you to select the user type.

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5. On the form, fill in the fields.

   For a description of the field values, see Create a user.

6. Select **Submit**.

What to do next

Associate an existing user with a consumer record. For more information, see Associate an existing user with a consumer record.

Associate an existing user with a consumer record

Associate a user with a consumer record in the Customer Service Management (CSM) application. After the association is done, you can access the Consumer Service Portal (CSP) as a consumer to search for information, create cases, and more.

Before you begin

Role required: sn_crm_consumer_data_manager, sn_crm_consumer_relationship_data_manager, sn_crm_household_data_manager or sn_crm_household_relationship_data_manager or sn_crm_foundation_data_manager, sn_crm_foundation_admin or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the consumer from the consumer record.
3. In the Login Details related list, select the User lookup icon to open the list of sys_users.
4. On the Users form, select the user to associate with the consumer record.

   Note: If the unified consumer is activated, you can select the user type from the interceptor form.

5. Select **Save**.

Result

The sys_user is associated with the consumer record. You can access the Consumer Service Portal (CSP) as a consumer.

Configuring a contact as a consumer

Associating a contact with the consumer in Customer Service Management (CSM) application enables you to function as both a B2B contact and a B2C consumer. Using this feature, you can easily switch between different customer portals without separate login credentials.

Contact as a consumer

Earlier, Customer Service Management (CSM) required separate user records for each customer persona. If a person was both a B2B contact and a B2C consumer, they would need two distinct user accounts with separate credentials. So, to meet customer expectations, the contact as a consumer feature enables organizations to provide a unified login experience for individuals, who hold multiple customer roles within the same ServiceNow® platform.

For example, in banking and financial services, a customer has a personal savings account (B2C consumer) and also owns a small business with a business account (B2B contact). With Contact as a Consumer, they can use one login to manage both accounts, switching between personal and business contexts as needed.

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Setting up a contact as a consumer

Set up a contact as a consumer by creating a single, unified profile that supports both the contact and consumer persona in the Customer Service Management (CSM) application.

Overview of unified consumer

A unified consumer is a single user profile that combines both contact and consumer persona within Customer Service Management (CSM). This feature eliminates the need to create and manage separate consumer user accounts for individuals who function in both roles.

The following table describes the setup procedure for activating a unified consumer:

Set up tasks for activating unified consumer

Task	Description
Update system property	Update the sn_customerservice.consumer.allowed_user_types system property to display the customer_contact extension records in the

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Set up tasks for activating unified consumer (continued)

Task	Description
	reference list. For more information, see Activate Unified Consumer.
Create and associate consumer user	Create and associate a contact with the consumer user. For more information, see Create and associate a consumer user.
Assign role to a contact	Assign role (sn_customerservice.consumer) to a contact. For more information, see Assign the consumer role to a contact.

Related topics

Configuring a contact as a consumer

Create and associate a consumer user

Create and associate a contact user with a consumer record so that your user can access the multiple portals. This process involves creating a consumer user through a consumer form and then associating the contact to a consumer record.

Create and associate contact with consumer user

Task	Description
Create a consumer user	Create a consumer user record to establish the B2C identity required before associating it to an existing B2B contact. For more information, see Create a consumer record.
Associate an existing contact user with a consumer record	Associate a contact with a consumer record to enable seamless access to both accounts. For more information, see Associate an existing contact user with a consumer record.

Create a consumer record

Create a consumer user record directly from the consumer form by using the User reference field. This field allows you to either select an existing user, which then automatically links to the consumer record.

Before you begin

Role required: One of the following roles:

- admin
- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_household_data_manager
- sn_crm_household_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin

About this task

Create a consumer user to associate it with a new or existing contact.

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the consumer from the consumer record.
3. In the login Details related list, select the User lookup icon to open the list of customer_contact.
4. On the Users list, select **New**.

   Note: If the unified consumer isn't configured, the system redirects to the consumer user form. If other user extensions are configured, it redirects to the interceptor, enabling you to select the user type.

5. On the form, fill in the fields.

   For a description of the field values, see Contact form for Email Interaction for CSM.

6. Select **Submit**.

What to do next

Associate an existing contact user with a consumer record

Associate an existing contact user with a consumer record

Associate a contact with a consumer record in the Customer Service Management (CSM) application. After the association is done, you can access the Consumer Service Portal (CSP) as a consumer to search for information, create cases, and more.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Contacts**.
2. Select the contact from the contact record.
3. In the login details related list, select the User lookup icon to open the list of consumer_contact.
4. On the contacts form, select the user to associate with the consumer record.

   Note: If the unified consumer is activated, you can select the user type from the interceptor form.

5. Select **Save**.

Related topics

Create a consumer record

Assign the consumer role to a contact

Assign the consumer role to a contact

Assign the Consumer (sn_customerservice.consumer) role to the customer_contact to designate them as a consumer in the Customer Service Management (CSM) application.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Contacts**.
2. Select a contact from the contact records.
3. In the Roles related list, select **Edit**.
4. In the Collection list, select the Consumer (sn_customerservice.consumer) role and move it to the Roles list.
5. Select **Save**.

Result

Selected contact is now both a consumer and a contact.

Related topics

Configuring a contact as a consumer

Update system property

Update the sn_customerservice.consumer.allowed_user_types system property within the Customer Service Management (CSM) application to enable the association of consumer records with contact user records or with user records. This modification enables you to display the customer_contact or sys_user extension records in the reference list for the users in the csm_consumer table.

Before you begin

Role required: admin

About this task

This property controls the reference qualifier on the user field in the consumer record, determining which user types appear in the lookup.

Procedure

1. In the workspace filter navigator, enter sys_properties.LIST to access the system properties list.
2. In the **Name** column, use the search field to locate the sn_customerservice.consumer.allowed_user_types system property.
3. Open the record.
4. The default value is csm_consumer_user, which restricts consumer records to be linked only with consumer user records.
5. In the **Value** field, add the required user type to the existing default value (csm_consumer_user).

   Note: Add the following based on the requirement:

System property	Description
customer_contact	configures a contact as a consumer
sys_user	configures a user as a consumer

   For example, value can be: csm_consumer_user, customer_contact

6. Select **Update**.

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Result

When you navigate to a consumer record and access the **User** field, the reference qualifier displays the following record types:

- Consumer user records (existing behavior)
- Contact user records (new capability), if included customer_contact, or
- User records, if included sys_user

This configuration enables administrators to link a consumer record directly to a contact user record, enabling the unified login experience for users who function as both B2B contacts and B2C consumers.

Configure Contributor Users

The CSM Contributor User plugin enables you to engage middle office teams in resolving customer issues and requests.

Before you begin

Role required: admin

About this task

With the provided roles, relationships, and user profile attributes, contributors can report and follow up on cases created for customers, service organizations, or themselves.

The CSM Query Rules plugin is automatically activated by the CSM Contributor User plugin (com.snc.csm_contributor_user). The CSM Contributor User plugin is moved to App Store beginning with the Australia release. For more information, see CSM Query Rules.

Procedure

1. Activate the CSM Contributor User plugin (com.snc.csm_contributor_user).
2. Assign the contributor user roles to middle office users.
3. Create relationships.
4. Confirm the **sn_cs_queryrules.use_query_rules** property is set to true.

Related topics

Contributor users

Contributor user roles

Contributor users

With contributor user roles, you can engage both internal and external users to assist in resolving customer issues and requests.

The contributor users feature provides unified customer support for internal and external customers. With this feature, you can serve internal and external customers through shared service teams and service organizations:

- Enable service organizations to serve one another and external customers.
- Enable employees to request support for themselves and for external customers.
- Enable middle office agents to work on specific case tasks that are required to resolve cases.

Overview of contributor user roles

The contributor users feature includes several roles that you can assign to users to control access to cases, case tasks, and case-related information. These roles can be assigned to users

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based on different business needs. In some cases, these roles also provide access to the parent cases and associated customer information.

The contributor users feature also includes viewer roles that enable employees to view cases, cases tasks, or core customer data. These roles include:

- Case Viewer
- Case Task Viewer
- Customer Data Viewer

Contributor user role description and capabilities

Requester type	Description	Capabilities
Requester for any customer	A requester who can create cases on behalf of any customer. This user: • Works with accounts and contacts or consumers. • Uses the Customer or Consumer Service Portal to assist customers. Roles: • Account contributor (sn_customerservice.account_contributor) • Consumer contributor (sn_customerservice.consumer_contributor)	This user can: • Search knowledge articles and catalog items. • Create cases for customers who visit a business organization, including cases for catalog items (requests). • Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging. If also an internal user on a case, this user can: • Add additional comments and attachments • Accept or reject a solution • Close a case • Receive notifications of case updates • Read work notes
Requester for customers linked to an organization	A requester who can create cases on behalf of customers associated with an organization using a criteria. This user: • Works with accounts, consumers and households. • Uses the Customer or Consumer Service Portal to assist customers. Roles:	This user can: • Search knowledge articles and catalog items. • Create cases for customers at your business organization who visit your business organization, including cases for catalog items (requests). • Create cases for customers at your business organization from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging. If also an internal user on a case, this user can:

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Contributor user role description and capabilities (continued)

Requester type	Description	Capabilities
	• Business Organization Consumer Contributor (sn_bus_loc.business_org_consumer_contributor) • Business Organization Account Contributor (sn_bus_loc.business_org_account_contributor)	• Add additional comments and attachments • Accept or reject a solution • Close a case • Receive notifications of case updates • Read work notes

Requester for my customers	A requester who can create cases on behalf of customers with whom they have an established relationship.
	
	This user:
	• Works with accounts and contacts or consumers.
	• Uses the Customer or Consumer Service Portal to assist customers.
	• Manages customer relationships and assists with customer cases.
	
	Role: Relationship contributor (sn_customerservice.relationship_contributor)
		This user can:
		• Search knowledge articles and catalog items.
		• Create cases on behalf of customers with whom they have a relationship.
		• Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging.
		• View and follow up on all cases created for customers with whom they have a relationship.
		• Update customer data such as adding contacts and addresses.
		• Update cases:
		  ○ Add additional comments and attachments
		  ○ Accept or reject a solution
		  ○ Close a case
		  ○ Receive notifications of case updates
		  ○ Read work notes

Requester for service organization	A requester who can create cases on behalf of their business location. This user: • Works with accounts and contacts, consumers, and households. • Uses the Customer or Consumer Service Portal to assist customers. Role: Service organization contributor (sn_customerservice.service_organization_contributor)	This user can: • Search knowledge articles and catalog items. • Create cases on behalf of their business location, including cases for catalog items (requests), and follow up on those cases. • Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging. • View and follow up on other cases created for the user's business location. If also an internal user on a case, this user can:

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Contributor user role description and capabilities (continued)

Requester type	Description	Capabilities
		• Add additional comments and attachments • Accept or reject a solution • Close a case • Receive notifications of case updates • Read work notes

Requester for self	A requester who can create cases for themselves.
	
	This requester accesses cases through a unified employee portal, if provided by their organization.
	
	Role: Self-contributor (sn_customerservice.self_contributor)
		This user can:
		• Search knowledge articles and catalog items.
		• Create cases on behalf of themselves, including cases for catalog items (requests).
		• Create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging.
		• View and follow up on the cases that they've created from themselves:
		  ○ Add additional comments and attachments
		  ○ Accept or reject a solution
		  ○ Close a case
		  ○ Receive notifications of case updates
		  ○ Read work notes

The contributor roles in the preceding table also have the capability to work on the case tasks. For more details on these capabilities, see #unique_198_Connect_42_case-task-contributor-roles.

The contributor user roles are available with different CSM plugins. For a more detailed description of these user roles, see Contributor user roles.

Fields added to the Case form

The contributor users feature adds two fields to the Case form that are used to identify the customer for a case. These fields are used in addition to the **Account** and **Consumer** fields.

Customer fields added to Case form

Field	Description
Requester Organization	This field displays the name of a service organization. If this field is filled in, and the **Account** and **Consumer** fields are empty, the customer for the case is a service organization.

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Customer fields added to Case form (continued)

Field	Description
	This field is included with the Service Organization plugin (com.snc.service_organization).
Requested By	This field displays the name of the requester. If this field is filled in and the **Account**, **Consumer**, and **Requester Organization** fields are empty, the customer for the case is an employee. This field is included with the Case Management Core plugin (com.sn_customerservice).

The Customer Service plugin adds two fields to the Notes section of the Case form for contributor users.

Contributor fields added to Case form

Field	Description
Contributor Users	When a user with the case task agent role is assigned to a case task, the user is added to the **Contributor Users** field. If a user is removed from the **Assigned to** field on the Case Task form, and they aren't assigned to any other tasks for the case, they're also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If a user is removed from the **Assigned to** field on the Case Task form, and no other members of their assignment group are assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group isn't assigned to any other tasks for the case, the assignment group is removed from the **Contributor Groups** field.

Create Case for Customer record producer

The contributor users feature adds a record producer that contributor users can access from the Customer and Consumer Service Portals and use to create cases. When creating a case, this record producer presents different options for the customer in the **Who are you creating this case for?** field, depending on the roles assigned to the logged-in user.

When the contributor user selects an option, additional fields related to that customer type are displayed.

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Customer type fields added to Create a Customer Case record producer

Customer option	Additional fields
Account	• **Reported by**: the logged-in user with the account contributor role. • **Account**: the name of the account. • **Contact**: the contact for the account.
Consumer	• **Reported by**: the logged-in user with the consumer contributor role. • **Consumer**: the name of the consumer. • **Household**: The household that the consumer belongs to.
Business Location	• **Reported by**: the logged-in user with the service organization contributor role. • **Requesting Business Location**: the name of the service organization requesting assistance. • **Requesting support from Business Location**: The name of the service organization from which the **Requesting Business Location** is asking assistance.
Myself	**Reported By**: the logged-in user with the self-contributor role.

Additional fields on the record producer that are common to all customer options include **Priority**, **Channel**, **Subject**, and **Description**.

Viewing record lists on the Customer and Consumer Service Portals

The My Lists widget on the Customer and Consumer Service Portals includes different filters for viewing records.

Depending on the roles assigned to the logged-in user, this widget displays the following filters.

My Lists filters

Contributor user	My Lists filters
Account contributor	**Cases for Accounts**
Consumer contributor	**Cases for Consumers**

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My Lists filters (continued)

Contributor user	My Lists filters
Service organization contributor	• **My Cases for Business Locations**: cases created by the contributor user on behalf of their business locations. • **All Cases for Business Locations**: All cases created on behalf of the contributor's business locations, independent of who created the case.
Self-contributor	**Cases for myself**
Relationship contributor	Displays filters depending on the relationships established for this user. • **My Cases for Accounts**: Cases created by the contributor user on behalf of accounts where the user is an Account Manager. • **All Cases for Accounts**: All cases created on behalf of accounts where the user is an Account Manager, independent of who created the case. • **My Cases for Consumers**: Cases created by the contributor user on behalf of consumers or households where the user is a Relationship Manager. • **All Cases for Consumers**: All cases created on behalf of consumers or households where the user is a Relationship Manager, independent of who created the case. For more information, see Service Model Foundation relationships.

Access to case tasks

Users with the case task agent role can view and access case tasks in lists, on dashboards, and on landing pages.

Use widgets to display case tasks on dashboards and landing pages.

Widgets for displaying case tasks

Widget	Task information displayed
My Case Tasks	This widget includes the following information for each case task: • Task number • Status • Subject

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Widgets for displaying case tasks (continued)

Widget	Task information displayed
	• Priority • Case number • Case short description
My Group's Case Tasks	This widget includes the following information for each case task: • Task number • Status • Subject • Priority • Assigned to • Case number • Case short description

Note: If a playbook is available, the system opens the case task within in the playbook. If no playbook is available, the system opens the Case Task form.

Depending on assigned roles, contributor users can see different modules in CSM Agent Workspace and CSM Configurable Workspace.

Module access by role

Role	Modules

Case task agent
 	
[sn_customerservice.case_task_agent]
	Users with the case task agent role have access to these modules:
	• **Case Task**: Includes the case tasks that the user has access to.
	  ○ My Case Tasks
	  ○ My Open
	  ○ Unassigned for my groups
	  ○ My Accessible Tasks
	• **Customers**: Includes read-only access to customer information.
	  ○ Accounts
	  ○ Partners
	  ○ Contacts
	  ○ Consumers
	  ○ Households
	  ○ Household members

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Module access by role (continued)

Role	Modules
Case task viewer [sn_customerservice.case_task_viewer]	Users with the case task viewer role have access to All tasks in the **Case Task** module.
Case contributor viewer [sn_customerservice.case_contributor_viewer]	Users with the case contributor viewer role have access to My Contributing Tasks in the **Case Task** module.
Case viewer [sn_customerservice.case_viewer]	Users with the case viewer role can see the cases that they have access to in the **Cases** module.

Case task agent access to customer information

Users with the case task agent role have read-only access to some of the customer information for the parent case.

- For B2B cases: Account and contact records, including addresses, sold products, and install base.
- For B2C cases: Consumer and household records, including addresses, sold products, install base, and head of household.
- For business location cases: Service organization records, including internal contact information.

Related topics

Contributor user roles

Configure Contributor Users

Business Stakeholder for Customer Service Management

Contributor user roles

The contributor user data model includes several roles that control access to cases, case tasks, and related information, assigned to users based on business needs.

These roles are included with several different plugins:

- Case Management Core (com.sn_customerservice)
- CSM Contributor User (com.snc.csm_contributor_user)
- Business Location (com.snc.business_location)
- CSM Base Extension Entities (com.snc.cs_base_extension)

See the following tables for detailed role descriptions.

Roles included with the Case Management Core plugin

The following table lists the contributor roles that are included with the Case Management Core (com.sn_customerservice) plugin along with their descriptions and associated roles.

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Customer service roles

Role	Description	Contains roles
Case contributor editor [sn_customerservice.case_contributor_editor]	This role provides limited write access to some of the fields on the Case form if the user has read access to the case through another role. Limited write access is available for the following fields: • Work notes • Additional comments • Attachments • State or stage changes • Contributor users • Contributor groups • Watchlist • Work notes list	
Case contributor viewer [sn_customerservice.case_contributor_viewer]	This role provides read access to all tables associated with a case if the user has read access to the case through another role. The user can access the **All tasks I participate in** module in CSM Agent Workspace.	• sn_shn.user • wm_read

Roles included with the CSM Contributor User plugin

The following table lists the contributor roles that are included with the CSM Contributor User (com.snc.csm_contributor_user) plugin along with their descriptions and associated roles.

Roles for the contributor user plugin

Role	Description	Contains roles
Account contributor [sn_customerservice.account_contributor]	This role enables users to create cases for any account.	sn_customerservice.case_contributor_creator
Consumer contributor [sn_customerservice.consumer_contributor]	This role enables users to create cases for any consumer.	sn_customerservice.case_contributor_creator
Self-contributor [sn_customerservice.self_contributor]	This role enables users with snc_internal role to create cases for themselves.	sn_customerservice.case_contributor_creator

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Roles for the contributor user plugin (continued)

Role	Description	Contains roles
Case contributor creator [case_contributor_creator]	This role enables users to create cases and is included in the top-level contributor roles.	

Roles included with the Business Location plugin

The following contributor roles are included with the Business Location plugin (com.snc.business_location).

Roles for the business location plugin

Role	Description	Contains roles
Service organization contributor [sn_customerservice.service_organization_contributor]	This role enables you to create cases for your service organization (business location). **Note:** A service organization contributor must be a member of a service organization to create cases on its behalf. **Note:** Review your entitlements to determine licensing type of this role.	sn_customerservice.case_contributor_creator
Business Org Account Contributor [sn_bus_loc.business_org_account_contributor]	Creates cases for accounts associated with their business organization using criteria-based restricted customer access. Tracks and manages cases created by them for the accounts associated with their business organization.	
Business Org Consumer Contributor [sn_bus_loc.business_org_consumer_contributor]	Creates cases for consumers and households associated with their business organization using criteria-based restricted customer access. Tracks and manages cases created by them for the consumers or households associated with their business organization.	

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Roles included with the CSM Base Extension Entities plugin

The following contributor roles are included with the CSM Base Extension Entities plugin (com.snc.cs_base_extension).

Roles for the CSM base extension entities plugin

Role	Description	Contains roles
Relationship contributor [sn_customerservice.relationship_contributor]	This role enables you to create cases for customers with which they have an established relationship. **Note:** • The CSM Contributor User (com.snc.csm_contributor_user) plugin must be activated. **Note:** The CSM Contributor User plugin is moved to the App Store beginning with Australia release. • A relationship contributor must be a member of an account, contact, or household team to create cases on their behalf.	sn_customerservice.case_contributor_creator

Additional roles

Additional contributor roles

Role	Description	Contains roles
Customer data viewer [sn_customerservice.customer_data_viewer]	This role provides read access to customer data, including account, consumer, and household data, and the information included in the related lists.	
Workspace user [sn_customerservice.csm_workspace_user]	This role provides access to case tasks from the following modules in the CSM workspaces: • My Case Tasks • My Group's Case Tasks	• agent_workspace_user • canvas_user • sn_templated_snip.template_snippet_reader • email_composer

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Additional contributor roles (continued)

Role	Description	Contains roles
	You can also: • Use Agent Assist to search for knowledge articles (if the User Criteria are set to provide access to knowledge). • Create email (if you have the written access to the record and the email_composer role). • View response templates (if response templates have been configured for the record).	

Related topics

Configure Contributor Users

Contributor users

Cases and case tasks

Roles installed with Customer Service Management

Business Stakeholder for Customer Service Management

Configuring customer access management

Ensure that the customer access management is set up correctly for the user by completing all configuration tasks using the Customer Service Management (CSM) application.

Overview of customer access management

Customer Access Management (CAM) enables you to grant varying levels of access to different contacts and consumers for customer data, such as cases, sold products, and more. It also enables you to control internal user access based on their relationship with the customer.

As the needs of industry verticals grow, enterprises encounter complex use cases. There are use case scenarios where case management can be handled by more than one customer contact. For example, in a B2C scenario, a loan applicant wants to add a co-borrower, guarantor, and an attorney to a housing loan application. Everyone has the same level of access to respond to the loan application-related case. In other cases, products purchased by a customer can have multiple departments tracking the product, like the finance team tracking renewals or the operations team tracking maintenance.

Customer access management enables enterprises across industry verticals such as hi-tech, telecommunications, financial services, government, and manufacturing to meet these complex use cases.

Customer access management helps customer service agents add multiple related parties and provides them with varying levels of access to a case. While adding related parties to a case, customer service agents can select the relationship type. The relationship type defaults the responsibility that drives the access level for the related parties, such as contacts or consumers on a case.

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Key benefits

Customer access management:

- Improves the customer experience by enabling related parties to track and collaborate on cases
- Improves operational efficiency by enabling customers to track cases for products and services
- Increases automation by automatically granting access to cases based on access to the sold product

Configuration tasks for customer access management

Listed are the following key configuration tasks required to set up and manage customer access.

Task	Description
Customer access management tables and plugins.	Add new tables or modify existing tables to enable customer access management.
Install roles with customer access management.	Use different predefined functional and granular roles to establish relationships between users and entities.
Create a responsibility definition	Define a role or responsibility that can support your organization and users in the Customer Service Management (CSM) application.
Configure access through the responsibility access configuration	Streamline how you create and update your responsibility definitions and access configurations by using the declarative responsibility framework in the Customer Service Management (CSM) application.
Create related party configurations.	Link related party entity responsibilities to responsibility definitions by adding related party configurations to a case.

Related topics

Data management for Customer Service Management

Using customer access management

Customer access management tables and plugins

Learn about the tables and plugins that you can use with customer access management.

The customer access management feature adds new tables or modifies existing tables. You can activate the following plugins that enable features, such as enabling restricted contact access. To activate these plugins, you must have the admin role. For details, see Activate a plugin.

Plugins used by customer access management

Plugin	Description	Tables
Case Management Core [com.sn_customerservice]	Enables customers to provide service and support	• Account Access [sn_csm_account_access]

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Plugins used by customer access management (continued)

Plugin	Description	Tables
	to external customers by using several communication channels, such as email, web, and telephone.	• Case [sn_customerservice_case] • Related Party [sn_customerservice_related_party] • Related Party Configuration [sn_customerservice_related_party_configuration]
Customer Service Install Base Management [com.snc.install_base]	Enables customers to capture the current state of a customer's install base and establish the relationship to any downstream entities that might impact their functioning.	• Sold Product [sn_install_base_sold_product] • Sold Product Related Party [sn_install_base_sold_product_related_party] • Install Base Related Party [sn_install_base_related_party]

Tables used by customer access management

Table	Columns
Account Access [sn_csm_account_access] Enable restricted access to account contacts for sold products and install bases.	Account [customer_account] Account associated with the sold product.
	Restrict Contact Access Access that is restricted to entities due to their associated contacts. If the value of the field is **False**, the contacts that are associated with the account can read the sold products and install bases that are associated with the account. If the value of the field is **True**, the contacts that are associated with the accounts don't get access to the sold products and install bases, unless they're added as a contact on the record or as a related party. The following

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Tables used by customer access management (continued)

Table	Columns
	contacts get access to the sold products and install bases: • Contacts that are associated with the sold product and install base records. • Contacts that are added as related parties with an Authorized Representative responsibility. • Contacts that belong to accounts that are added as related parties with an Authorized Account responsibility.
Responsibility Definition [sn_customerservice_responsibility_def]	• Name • Applicable to • Type • Unique For more information on the column types, see Create a responsibility definition.
Related Party Configuration [sn_customerservice_related_party_configuration]	Default Responsibility [sn_customerservice_responsibility_def] Reference to the sn_customerservice_responsibility_def table. **Note:** Starting with the Washington DC release, the Related Party Configuration [sn_customerservice_related_party_configuration] table is reparented to the Application file [sys_metadata] table.
Sold Product [sn_install_base_sold_product]	Contact [customer_contact] Primary contact for the sold product.
	Additional Consumers [additional_consumers] Additional consumers that are associated with the sold product. The **Additional Consumers** field isn't exposed to customers through any forms or lists and is added for performance reasons.
	Additional Users [additional_users]

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Tables used by customer access management (continued)

Table	Columns
	Additional users that are associated with the sold product. The **Additional Users** field isn't exposed to customers through any forms or lists and is added for performance reasons.
Sold Product Related Party [sn_install_base_sold_product_related_party]	Sold Product [sn_install_base_sold_product] Products and components that are sold to an account or a consumer.
	Type [sn_customerservice_related_party_configuration] Type of relationship that the related party has with the sold product.
	Responsibility [sn_customerservice_responsibility_def] Access level that the user has on the sold product and associated entities.
	Consumer [csm_consumer] Consumer that has the assigned responsibility for the sold product.
	Contact [customer_contact] Contact that has the assigned responsibility for the sold product.
	Account [customer_account] All contacts within the account that have the assigned responsibility for the sold product.
Contact Sold Product [sn_install_base_rel_soldproduct_to_contact] Establishes account contact relationships with the sold products.	Sold Product [sn_install_base_sold_product] Products and components that are sold to an account or a consumer.
	Contact

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Tables used by customer access management (continued)

Table	Columns
Note: Starting with the Brazil release, the sn_install_base_rel_soldproduct_to_contact table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the sold product-related parties table [sn_install_base_sold_product_related_party].	[customer_contact] Contact that has the assigned responsibility for the sold product.
	Type [sn_customerservice_related_party_configuration] Name for this relationship.
	Responsibility [sn_customerservice_responsibility_def] Access level that the contact has on the sold product and associated entities.
Consumer Sold Product [sn_install_base_m2m_consumer_sold_product] **Note:** Starting with the Brazil release, the sn_install_base_m2m_consumer_sold_product table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the sold product-related parties table [sn_install_base_sold_product_related_party].	Type [sn_customerservice_related_party_configuration] Name for this relationship.
	Responsibility [sn_customerservice_responsibility_def] Access level that the consumer has on the sold product and associated entities.
Case [sn_customerservice_case]	Additional Consumers [additional_consumers] Additional consumers that are associated with the case. The **Additional Consumers** field isn't exposed to customers through any forms or lists and is added for performance reasons.
	Additional Users [additional_users] Additional users that are associated with the case. The **Additional Users** field isn't exposed to customers through any forms or lists and is added for performance reasons.
Install Base Related Party [sn_install_base_related_party]	Install Base Item sn_install_base_item

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Tables used by customer access management (continued)

Table	Columns
Note: The sn_install_base_related_party table is extendible and can be used to capture industry-specific attributes that correspond to a related party.	Instances of the product that are configured for a customer.
	Responsibility [sn_customerservice_responsibility_def] Access level to install the base and related information.
	Type [sn_customerservice_related_party_configuration] Name for this relationship.
	User sys_user Consumer, contact, service organization, member, or internal user that has the assigned responsibility for the install base.
	Consumer [csm_consumer] Consumer that has the assigned responsibility for the install base.
	Account [customer_account] All contacts within the account that have the assigned responsibility for the install base.
	Contact [customer_contact] Contact that is primarily responsible for the install base.
	Organization Core sn_customer_service_organization Service organization that is primarily responsible for the install base.
	Class class

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Tables used by customer access management (continued)

Table	Columns
	Type of record.
Related Party [sn_customerservice_related_party]	Responsibility [sn_customerservice_responsibility_def] Reference to the sn_customerservice_responsibility_def table.

Roles installed with customer access management

Customer access management uses different functional and granular roles to establish relationships between users and entities. The granular and functional roles help provide user access to information and maintain data security.

Functional and granular roles overview

Functional and granular roles help provide authorized related parties access to the case, and provide additional contacts or additional consumers access to the sold product.

Granular roles provide access to cases, sold product, and related entities. One or more granular roles can be bundled together as a functional role to perform a meaningful action. Linking multiple granular roles to a functional role enables you to build your own access rules by applying the functional and granular roles for various Customer Service Management (CSM) entities.

A granular model helps to protect data by granting the required level of access to the relevant CSM entities. With this functionality, each role is associated with a set of privileges or responsibilities that determine your access to certain information. You can set granular policies that authorize individuals to do their jobs efficiently and effectively, which helps to improve the customer experience.

Roles and descriptions

Functional roles are a set of granular roles that are required to perform a function that requires access on multiple entities. The following table lists the functional roles for customer access management.

Functional roles

Role title [name]	Plugins required	Description	Contains roles
Case Authorized Contact [sn_customerservice.case_authorized_contact]	Case Management Core [com.sn_customerservice]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.	sn_customerservice.case_write_granular

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Functional roles (continued)

Role title [name]	Plugins required	Description	Contains roles
Case Authorized Consumer [sn_customerservice.case_authorized_consumer]	Case Management Core [com.sn_customerservice]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.	sn_customerservice.case_write_granular
Case Authorized Contributor [sn_customerservice.case_authorized_contributor]	Case Management Core [com.sn_customerservice]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.	sn_customerservice.case_write_granular
Sold Product Authorized Contact [sn_install_base.sold_product_authorized_contact]	Customer Service Install Base Management [com.snc.install_base]	This role provides access to view sold product and associated install base items, create cases, and access cases that are related to the sold product. Also, this role provides access to sold product related parties, affected install base items, and manage service catalog requests from the sold product.	• sn_customerservice.case_authorized_co • sn_install_base.sold_product_contact_r • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Sold Product Authorized Consumer [sn_install_base.sold_product_authorized_consumer]	Customer Service Install Base Management [com.snc.install_base]	This role provides access to view sold product and associated install base items, create cases, and access cases related to the sold product. Also, this role provides access to sold product related parties, affected install base items, and manage service catalog requests from the sold product.	• sn_customerservice.case_authorized_co • sn_install_base.sold_product_consumer • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Contact [sn_install_base.install_base_authorized_contact]	Customer Service Install Base Management [com.snc.install_base]	This role provides the contact access to view the install base and its associated sold products when added as a related party. Additionally, it enables the contact to create and manage cases	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_

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Functional roles (continued)

Role title [name]	Plugins required	Description	Contains roles
		for the related install base records. Creation of case is only enabled if the contact and install base belong to the same account.	
Install Base Authorized Consumer [sn_install_base.install_base_authorized_consumer]	Customer Service Install Base Management [com.snc.install_base]	This role provides the consumer access to view the install base and its associated sold products when added as a related party. Additionally, it enables you to create and manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Contributor [sn_install_base.install_base_authorized_contributor]	Customer Service Install Base Management [com.snc.install_base]	This role provides the internal user to view the install base and its associated sold products when added as a related party. Additionally, it enables you to create and manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Member [sn_install_base.install_base_authorized_member]	Customer Service Install Base Management [com.snc.install_base]	This role provides the service organization member to view the install base and its associated sold products when added as a related party. Additionally, it enables you to create and manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_
Install Base Authorized Account	Customer Service Install Base Management [com.snc.install_base]	Provides access to all the contacts of the account to view the install base and its associated sold products when added as a related party. Additionally, it enables the contact to create and manage cases for the related install base records. Creation of case is only enabled if contact	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_

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Functional roles (continued)

Role title [name]	Plugins required	Description	Contains roles
		and install base belongs to same account.	
Install Base Service Organization	Customer Service Install Base Management [com.snc.install_base]	Provides access to all the members of service organization to view the install base and its associated sold products when added as a related party. Additionally, it enables you to manage cases for the related install base records.	• sn_customerservice.case_write_granular • sn_install_base.install_base_related_pa • sn_install_base.sold_product_read_gran • sn_install_base.install_base_read_granu • sn_install_base.installed_product_read_

The following table lists the granular roles for customer access management.

Granular roles

Role title [name]	Plugin required	Description	Contains roles
Sold Product Read [sn_install_base.sold_product_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to the sold product.	None
Sold Product Contact Read [sn_install_base.sold_product_contact_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to related parties of the sold product.	None
Sold Product Contact Write [sn_install_base.sold_product_contact_write_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular write access to related parties of the sold product.	sn_install_base.sold_product_contact_rea
Sold Product Consumer Read [sn_install_base.sold_product_consumer_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to additional consumers of the sold product and sold product-related parties.	None
Sold Product Consumer Write [sn_install_base.sold_product_consumer_write_granular]	Customer Service Install Base Management	This role provides granular write access to additional consumers of	sn_install_base.sold_product_consumer_r

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Granular roles (continued)

Role title [name]	Plugin required	Description	Contains roles
	[com.snc.install_base]	the sold product and sold product-related parties.	
Case Read [sn_customerservice.case_read_granular]	Case Management Core [com.sn_customerservice]	This role provides granular read access to the case.	None
Cases Create [sn_customerservice.case_create_granular]	Case Management Core [com.sn_customerservice]	This role provides granular create access to the case.	sn_customerservice.case_read_granular
Case Write [sn_customerservice.case_write_granular]	Case Management Core [com.sn_customerservice]	This role provides granular write access to the case.	• sn_customerservice.case_read_granular • sn_customerservice.case_create_granul
Case Related Party Write [sn_customerservice.case_related_party_write_granular]	Case Management Core [com.sn_customerservice]	This role provides granular write access to case-related parties.	None
Install Base Read [sn_install_base.install_base_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to the install base.	None
Install Base Related Party Read [sn_install_base.install_base_related_party_read_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular read access to install base related party records.	None
Install Base Related Party Write [sn_install_base.install_base_related_party_write_granular]	Customer Service Install Base Management [com.snc.install_base]	This role provides granular write access to install base related party records.	[sn_install_base.install_base_related_part]
Installed Product Read [sn_install_base.installed_product_read_granular]	Customer Service Install Base Management	This role provides granular read access to the installed product.	None

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Granular roles (continued)

Role title [name]	Plugin required	Description	Contains roles
	[com.snc.install_base]		

Related topics

Assign granular roles to a functional role

Assign granular roles to a functional role

Assign granular roles to a functional role to give authorized related parties access to the case, and enable additional contacts and consumers access to the sold product.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter `sys_user_role.list`.
2. In the **Search** field, enter `*authorized`.
   You can see the list of functional roles that are provided in the base system.
3. Select the functional role that you want to customize.
4. From the Contains Roles related list, select **Edit** and add the desired granular role to the functional role.
5. Select **Save**.
   The granular role is added to the functional role.

Create a responsibility definition

A responsibility, or responsibility definition, specifies the role or function a user has within an entity, determining access through relationships. When creating a relationship, users are assigned specific responsibilities that grant access to the entity and its related entities.

Before you begin

Role required: One of the following roles:

- sn_crm_customer_access_management_admin
- sn_crm_foundation_admin
- admin

About this task

If you're using the Service Model Foundation feature, you can also create the responsibility definitions to use in customer and consumer relationships. For more information about configuring Service Model Foundation, see Configure Service Model Foundation.

The Responsibility Definition [sn_customerservice_responsibility_def] table supports domain separation. For more information on domain separation, see Domain separation and Customer Service Management.

Note: Starting with the Vancouver release, the Responsibility Definition [sn_customerservice_responsibility_def] table is reparented to the Application file [sys_metadata] table.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select **New**.
3. On the form, fill in the fields.

Responsibility Definition form fields

Field	Definition
Name	Name of the responsibility, fr example, account manager.
Type	Type of users to whom the responsibility can be assigned to: ○ User: Select **User** if this responsibility should be assigned to an employee. When assigning this type, the list of available users comes from the users [sys_users] table. ○ Contact: Select **Contact** if this responsibility should be assigned to a customer contact. When assigning this role, the list of available users comes from the contact [customer_contact] table. ○ Consumer: Select **Consumer** if this responsibility should be assigned to a customer contact. When assigning this role, the list of available users comes from the consumer [csm_customer] table. ○ Account: Select **Account** if this responsibility should be assigned to a customer contact. When assigning this role, the list of available users comes from the account [customer_account] table. ○ None: Select **None** if this responsibility definition is to be used when creating relationships between consumers. **Note:** Only the responsibility definitions with **Type** set to **User** can be used in the following Service Model Foundation relationships: ○ Account Team Member ○ Consumer Team Member ○ Household Team Member
Unique	Option that you can select to disable the duplicate entries for the responsibility definition.
Description	Provides a description of the purpose or function of the responsibility definition.

4. Select **Submit**.

What to do next

Configure access through the responsibility access configuration

Related topics

Service Model Foundation responsibilities

List of responsibilities provided with the base system

List of responsibilities that are provided with the base system.

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Responsibility table

Responsibility	Plugin	Used in Relationship	Role required	Supported through responsibility access configuration
Account Manager	Customer Service Base Extension Entities [com.snc.cs_base_extension]	Account Team Member [sn_customerservice_team_member]	• Relationship Agent [sn_customerservice.relationship_agent] • Relationship Contributor [sn_customerservice.relationship_contributor]	Yes
Relationship Manager	Customer Service Base Extension Entities [com.snc.cs_base_extension]	• Consumer Team Member [sn_customer_rel_consumer_team_member] • Household Team Member [sn_customer_rel_household_team_member]	• Relationship Agent [sn_customerservice.relationship_agent] • Relationship Contributor [sn_customerservice.relationship_contributor]	No
Authorized Account	Case Management Core [com.sn_customerservice]	Sold Product Related Party [sn_install_base_sold_product_related_party]	Sold Product Authorized Contact [sn_install_base.sold_product_authorized_contact]	No
		Install Base Related Party [sn_install_base_related_party]	Install Base Authorized Contact [sn_install_base.install_base_authorized_contact]	
Authorized Representative	Case Management Core [com.sn_customerservice]	Sold Product Related Party [sn_install_base_sold_product_related_party]	• Sold Product Authorized Contact [sn_install_base.sold_product_authorized_contact] • Sold Product Authorized Consumer [sn_install_base.sold_product_authorized_consum	No
		Install Base Related Party [sn_install_base_related_party]	• Install Base Authorized Contact [sn_install_base.install_base_authorized_contact] • Install Base Authorized Consumer [sn_install_base.install_base_authorized_consume	

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Responsibility table (continued)

Responsibility	Plugin	Used in Relationship	Role required	Supported through responsibility access configuration
		Related Party [sn_customerservice_related_party]	• Case Authorized Contact [sn_customerservice.case_authorized_contact] • Case Authorized Consumer [sn_customerservice.case_authorized_consumer] • Case Authorized Contributor [sn_customerservice.case_authorized_contributor]	
		Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer]	Consumer [csm_consumer]	
		Household Member Relationship [sn_customer_rel_household_member_relationship]	Consumer [csm_consumer]	
Preferred Technician	Case Management Core [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	None	No
Primary Support Agent	Case Management Core [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	None	No
Support Manager	Case Management Core [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	None	No
Asset Contact	Case Management Core [com.sn_customerservice]	Account Team Member [sn_customerservice_team_member]	None	No
Authorized Service Organization	Customer Service Install Base Management [com.snc.install_base]	Install Base Related Party [sn_install_base_related_party]	Install Base Authorized Member [sn_install_base.install_base_authorized_member]	No

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Responsibility table (continued)

Responsibility	Plugin	Used in Relationship	Role required	Supported through responsibility access configuration
	Note: You must install com.snc.service_organization for activating com.snc.install_base plugin.			
Location Relationship Manager	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Location Relationship Manager [sn_bus_loc.location_relationship_manager]	No
Location Contributor	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Service Organization Contributor [sn_customerservice.service_organization_contributo	No
Location Consumer Agent	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Location Consumer Agent [sn_customerservice.svc_location_consumer_agent]	No
Location Agent	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Location Agent [sn_customerservice.svc_location_agent]	No
Location Manager Fulfiller	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Location Manager [sn_customerservice.svc_location_manager]	No
Location Manager Contributor	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Location Manager Contributor [sn_customerservice.svc_location_manager_contribu	No
Location Support Agent	Business Location [com.snc.business_location]	Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Location Support Agent [sn_bus_loc.svc_location_support_agent]	No

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Creating a responsibility access configuration

Create responsibility access configurations to add or modify access for various user relationships using different association types.

Administrators can use these configurations to define the roles required to access specific table records, including the level of access. With new filters and table mappings, you can model granular relationships that represent a wide range of responsibilities within your organization.

For example, starting with the Zurich release, account manager responsibility access configuration is introduced out of the base system. Using this responsibility, you can assign the account manager responsibility to a specific account. This configuration grants access to account information, along with related entities such as cases, sold products, and more.

Association types

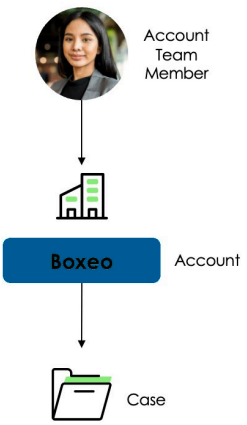
As an administrator, you can use this flexible framework to either create a responsibility with customized access rules or modify existing configurations as needed. You can create responsibility access configurations for various relationship patterns using appropriate association types.

- Simple association
- Dependent association
- Advanced association

Simple association

You can use this association when there's a direct relationship between the user and the target record. This association type uses direct field matching and doesn't require intermediate tables or custom logic.

Simple association workflow



Responsibility	Account Manager
Roles required	Sn_customerservice.relationship_agent
Tab 1	**Grant access to**
Access levels	Read
Accessible table	Case
Tab 2	**Through relationship**
Relationship table	Account Team Member
Relationship filter	User is Me
Tab 3	**Using SIMPLE relationship association**
Relationship field	account
Accessible table field	account

Simple association workflow

This scenario explains how access to case records is granted based on a user's direct relationship to the associated account. For example, Anna is an account manager for the customer account XYZ company. They need access to case records that are directly linked to XYZ company. As the case record includes a field for the associated account, the system can easily validate Anna's access based on the role and the account ID.

The system determines Alex's access using the following logic:

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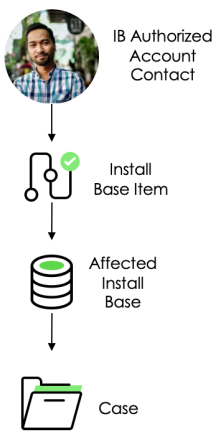
- Anna opens a case record.
- The system identifies the account associated with the case.
- It checks the account team member table to find a record where:
  - The user is Anna
  - The responsibility is the account manager
  - The account matches the account listed on the case
- If a matching record is found, access to the case is automatically granted.

This approach confirms that access is granted efficiently when there's a clear, one-to-one relationship between the user and the account associated with the case.

Dependent association

You can use this association when access must be determined through an intermediate relationship, often involving a many-to-many (M2M) table. This setup is common when a requester's connection to a record is established indirectly through related items.

Dependent association workflow



Responsibility	Authorized Account		
Roles required	sn_install_base.install_base_authorized_contact		
Tab 1	**Grant access to**		
Access levels	Read, Write		
Accessible table	Case		
Tab 2	**Through relationship**		
Relationship table	Install Base Related Party		
Relationship filter	Account is MyAccount		
Tab 3	**Using DEPENDENT relationship association**		
		Dependent table	Affected IB
Relationship field	Install_base_item	Dep. relationship field	Install_base_item
Accessible table field	sys_id	Dep. accessible table fld	csm_case

Dependent association workflow

This scenario explains how access to case records is granted based on a requester's relationship to install base items associated through an intermediate table. For example, Alex is a team member with authorized account responsibility and require access to specific case records that are tied to install base items. Alex's access depends on whether these case records are listed as an authorized party for any of those items. However, the relationship between the case and the install base item isn't direct, but it's maintained through a separate affected install base table.

The system determines Alex's access using the following logic:

- Alex opens a case record.
- The system checks if the case is linked to any install base items using the affected install base table.
- It retrieves the install base items associated with the case.
- The system checks if Alex is listed with the authorized account role for any of the install base items in the related party table.
- If Alex holds the required role for any matching item, access to the case record is automatically granted.

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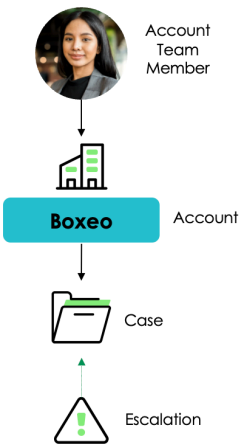
This approach confirms that access is granted only when a valid relationship exists between the requester and install base items, enforcing secure access even through indirect associations.

Advanced association

You can use this association in complex scenarios where simple relationship-based access is insufficient. This association type relies on custom script logic to validate requester's access across multiple related records.

Advanced association workflow



Responsibility	Account Manager
Roles required	Sn_customerservice.relationship_agent
Tab 1	**Grant access to**
Access levels	Read
Accessible table	Escalation
Tab 2	**Through relationship**
Relationship table	Account Team Member
Relationship filter	User is Me
Tab 3	**Using ADVANCED relationship association**
Relationship field	account
Field values script	***requires a function to get the account from the linked case from the escalation***

Advanced association workflow

This scenario explains how access to escalation records is determined based on the requester's relationship to the associated account.

For example, Anna is an account manager who needs access to specific escalation records. Some of these escalation records are tied to cases, which are in turn associated with accounts Anna manages. A custom script identifies the related accounts and verifies Anna's role before granting access to the escalation records.

The system determines Alex's access using the following logic:

1. Anna opens an escalation record.
2. The system checks the escalation's source:
   - If the escalation is linked to a customer case, the system identifies the account associated with that case.
   - If the escalation is directly linked to an account, the system uses the account record.
3. The system verifies if Anna is assigned as the account manager for the identified account.
4. If Anna is assigned to the account, access to the escalation record is automatically granted.

This approach confirms that access is granted only when a clear relationship exists between the user and account, whether the link is direct or through a related case.

Configure access through the responsibility access configuration

Streamline how you create and update your responsibility definitions and access configurations by using the declarative responsibility framework in the Customer Service Management (CSM) application. This framework enables you to select the level of access for each responsibility by leveraging low-code or no-code capabilities, which reduces the time required for scripting.

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Before you begin

Role required: One of the following roles:

- sn_crm_customer_access_management_admin
- sn_crm_foundation_admin
- admin

About this task

The Responsibility Access Configuration [sn_customerservice_responsibility_access_config] table is used to store the metadata of the responsibility access configuration. With this configuration, you can enable different levels of access for related party users across different records of the same entity. For example, a user with a location manager role might serve as a fulfiller at one business location and as an agent at another.

For more information about creating a responsibility definition, see Create a responsibility definition. The need for domain separation in configuring access records is determined by the domain of the referenced responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select a responsibility definition record.
3. From the Responsibility Access Configuration related list, select **New**.
4. On the form, fill in the fields.

Responsibility Access Configuration form fields

Field	Description
Responsibility	Responsibility applicable to this configuration, for example, account manager or authorized representative.
Active	Status of the configuration. By using this functionality, you can enable or disable a responsibility access configuration. The default value is **True**.
Roles required	Roles required in addition to responsibilities to get the access.
Description	Provides a description of the purpose or function of the responsibility access configuration.
Access levels	Levels of access for the accessible entities. The list shows the access levels, including read, write, and full. **Note:** Full represents a special access level that is equivalent to read, write, and create.
Accessible table	Entities or records accessible through this configuration, like cases or sold products.

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Field	Description
Accessible table filter	Additional conditions to filter the accessible table.
Relationship table	Relationship table where this configuration is applied, for example account team member [sn_customerservice_team_member] table.
Relationship filter	Additional conditions to filter the relationship record applicable to the user.
Type	Type of association between the accessible and relationship table. Listed are three types of association: ○ Simple ○ Dependent ○ Advanced
Relationship field	Field on the relationship table to be used for association.
Accessible table field	Field on the accessible table to be used for association.
Dependent table	Table that contains the mapping between the relationship field and accessible table field.
Dependent relationship field	Field on the dependent table that maps to the selected relationship field.
Dependent accessible table field	Field on the dependent table that maps to the selected accessible table field.
Field values script	Script that returns the valid association values for advanced association logic.
Description	Provides a description of the purpose or function of the responsibility definition.

Note: To create entries to the **Applies to Relationship**, **Access Levels**, or **Accessible Entities** fields in the Responsibility Access Configuration table, you must migrate all existing configurations for these fields in the `global.CSMRelationshipConstantsSNC` script include.

5. Select **Submit**.

Granular roles and entities for responsibility framework

Starting with the Yokohama release, module-level granular roles simplify defining and configuring the responsibility framework. The base system uses these roles in its table-level access control lists (ACLs) for the supported entities, so you can avoid creating custom table-level ACLs.

Granular roles for access through entities

The granular roles provide Create, Read, and Update (CRU) access across entities, based on the access permissions defined for each responsibility within the declarative responsibility framework.

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Note: You don't assign granular roles to users directly. Instead, you assign a functional role that's enabled for the responsibility framework, and that role contains the granular roles, so users inherit them through role containment. On its own, a granular role has no effect.

Granular roles	Description
sn_customerservice.cust_data_resp_granular	Provides granular access to customer-related foundational entities (including accounts, contacts, consumers, and households) through the responsibility framework.
sn_billing_account.resp_granular	Provides granular access to billing accounts and related entities through the responsibility framework.
sn_customerservice.case_mgmt_resp_granular	Provides granular access to case and related entities through the responsibility framework.
sn_install_base.resp_granular	Provides granular access to installed base items, sold products, and related entities through the responsibility framework.
sn_customerservice.contract_entitlement_resp_granular	Provides granular access to contracts, entitlements, and related entities through the responsibility framework.

Granular roles and supported entities

Granular roles are designed based on feature sets and can be used to provide access to supported tables or entities though the responsibility framework.

Feature Set	Granular Role	Supported Tables/Entities
Customer Data	sn_customerservice.cust_data_resp_granular	• Account [customer_account] • Account Team Member [sn_customerservice_team_member] • Account Address [account_address_relationship] • Account Relationship [account_relationship] • Contact Relationship [sn_customerservice_contact_relationship] • Contact [customer_contact] • Consumer [csm_consumer] • Consumer Profile Location [sn_csm_consumer_profile_location] • Escalation [sn_customerservice_escalation]

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Feature Set	Granular Role	Supported Tables/Entities
		• Location [cmn_location] • Asset Contact [sn_customerservice_m2m_asset_contact]
Billing Account	sn_billing_account.resp_granular	• Location [cmn_location] • Schedule [cmn_schedule] • Schedule Entry [cmn_schedule_span] • Billing Account [sn_billing_account_billing_account] • Billing Account Address [sn_billing_account_address] • Billing Account Payment Profile [sn_billing_account_payment_profile] • Billing Account Related Party [sn_billing_account_related_party]
Case Management	sn_customerservice.case_mgmt_resp_granular	• Case [sn_customerservice_case] • Task [sn_customerservice_task#] • Task service-level agreement (SLA) [task_sla#] • Escalation [sn_customerservice_escalation] • Work Order [wm_order]
Install Base Management	sn_install_base.resp_granular	• Installed Product [sn_install_base_m2m_installed_product] • Affected Install Base [sn_install_base_m2m_affected_install_base • Install Base Item [sn_install_base_item] • Sold Product Covered [sn_install_base_m2m_contract_sold_produc • Sold Product [sn_install_base_sold_product] • Install Base Related Party [sn_install_base_related_party] • Sold Product Related Party [sn_install_base_sold_product_related_party

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Feature Set	Granular Role	Supported Tables/Entities
		• Asset Contact [sn_customerservice_m2m_asset_contact] • Asset [alm_asset]
Contracts and Entitlements	sn_customerservice.contract_entitlement_resp_granular	• Contract [ast_contract] • Entitlement [service_entitlement]

Note: The granular roles include table-level ACLs in the base system. They don't include field-level ACLs. To provide access to specific fields, create field-level ACLs separately on the required roles.

System roles containing related granular roles

System Roles	Granular Roles
sn_customerservice.relationship_contributor	• sn_customerservice.cust_data_resp_granular • sn_install_base.resp_granular • sn_customerservice.case_mgmt_resp_granular
sn_customerservice.relationship_agent	• sn_customerservice.cust_data_resp_granular • sn_install_base.resp_granular • sn_customerservice.case_mgmt_resp_granular • sn_customerservice.contract_entitlement_resp_granular

How granular roles, functional roles, and query rules interact

In the responsibility framework, functional roles, granular roles, and query rules each control access in a different way:

Functional role

The role assigned to the user. The responsibility framework uses it as the role condition on responsibility access configurations and on query rules. For example, `sn_customerservice.relationship_agent`.

Granular role

The role inherited through the functional role that contains it. The base system uses it as the role condition on the table-level ACLs for a supported entity, such as `sn_customerservice.case_mgmt_resp_granular`. On its own, a granular role has no effect.

Query rule

A performance mechanism that a functional role activates. A query rule narrows the set of records the platform evaluates ACLs against, so the platform doesn't evaluate ACLs against every record in a large table. For more information on query rules, see CSM Query Rules.

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The ACLs make the access decision. Table-level ACLs use the granular role as the role condition. Record-level ACLs also use the granular role and call the responsibility framework to check whether the user's relationship and responsibility grant access to a specific record.

For a user to see relationship-based records in a list or in the CSM workspace, all of the following must be in place:

- A responsibility access configuration and a responsibility definition.
- An account team member record that links the user to the account.
- The functional role that activates the query rule, such as `sn_customerservice.relationship_agent`, or a custom query rule scoped to the user's functional role.

Note: If the user doesn't hold the functional role that activates the query rule, the platform may skip the query rule and the list returns no records. To give a custom role visibility to a relationship-based list, create a query rule scoped to that role.

Create related party configurations

Related party configurations define the title of a relationship between an entity and an organization or user. These configurations also enable linking related party types with responsibility definitions to grant access as needed.

Before you begin

Role required: One of the following roles:

- sn_crm_customer_access_management_admin
- sn_crm_foundation_admin
- admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Related Party Configuration**.
2. To create a related party configuration, select **New**.
3. On the form, fill in the fields.

Related Party Configuration record form

Field	Description
Name	Related party configuration type.
Applies To	Table assigned with the related party configuration.
Entity Type	Entity type such as an account, a consumer, or a product.
Reference Condition	Filter condition for defining the related party configuration. In the **Reference Condition** field, you can select **Add Filter Condition** or **Add "Or" Clause**.
Default Responsibility	Access level to different entities and the related information. **Note:** Whenever a related party record is created, the **Responsibility** field gets auto-populated from the default responsibility associated with the selected party type.
Default Order	Numerical value given to establish the priority of the relationship.

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Field	Description
	Note: Whenever a related party record is created, the **Order** field gets auto-populated from the default order associated with the selected party type.

4. Select **Submit**.

List of related party configurations provided with the base system

Related party configurations for different entities that are provided with the base system are listed in the following tables.

Related party configurations for cases

Types and responsibilities for cases are listed in the following table.

Cases

Type	Default Responsibility
Authorized Contact	Authorized Representative
Authorized Consumer	Authorized Representative
Authorized Contributor	Authorized Representative
Listed Contact	Not applicable
Listed Consumer	Not applicable

Related party configurations for sold products

Types and responsibilities for sold products are listed in the following table.

Sold Products

Type	Default Responsibility
Authorized Account	Authorized Account
Authorized Contact	Authorized Representative
Authorized Consumer	Authorized Representative
Listed Account	Not applicable
Listed Contact	Not applicable
Listed Consumer	Not applicable

Related party configurations for install bases

Types and responsibilities for install bases are listed in the following table.

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Install Bases

Type	Default Responsibility
Authorized Account	Authorized Account
Authorized Contact	Authorized Representative
Authorized Consumer	Authorized Representative
Authorized Contributor	Authorized Representative
Authorized Member	Authorized Representative
Authorized Service Organization	Authorized Service Organization
Listed Account	Not applicable
Listed Contact	Not applicable
Listed Consumer	Not applicable
Listed Contributor	Not applicable
Listed Member	Not applicable
Listed Service Organization	Not applicable

For more information on install base related parties, see Add related parties to an install base item.

Related party configurations for account team members

Types and responsibilities for account team member are listed in the following table.

Account Team Members

Type	Default Responsibility
Account Manager	Account Manager
Preferred Technician	Preferred Technician
Primary Support Agent	Primary Support Agent
Support Manager	Support Manager

Related party configurations for contact relationships

Types and responsibilities for contact relationship are listed in the following table.

Contact Relationships

Type	Default Responsibility
Asset Contact	Asset Contact

Related party configurations for consumer relationships

Types and responsibilities for consumer relationship are listed in the following table.

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Consumer Relationships

Type	Default Responsibility
Authorized Representative	Authorized Representative

Related party configurations for household member relationships

Types and responsibilities for household member relationship are listed in the following table.

Household Member Relationships

Type	Default Responsibility
Authorized Representative	Authorized Representative

Related party configurations for service organizations

Types and responsibilities for service organizations are listed in the following table.

Service Organizations

Type	Default Responsibility
Location Agent	Location Agent
Location Consumer Agent	Location Consumer Agent
Location Contributor	Location Contributor
Location Manager Contributor	Location Manager Contributor
Location Manager Fulfiller	Location Manager Fulfiller
Location Support Agent	Location Support Agent
Listed Member	Not applicable

Note:

- Whenever a related party record is created, the **Responsibility** field gets auto-populated from the default responsibility associated with the selected party type. Similarly, the **Order** field gets auto-populated from the default order associated with the selected party type.
- Listed role types don't have any responsibility. Since the correct role and responsibility determine access, related parties aren't granted access if the **Responsibility** field is left empty.

Populate the Type field in relationship tables using the fix script

Leverage the fix script to add and manage the **Type** field in relationship tables. This script simplifies data mapping and enhances record consistency across the base system.

Before you begin

Role required: admin

About this task

Starting with the Yokohama release, a new optional **Type** field is added to the account team member [sn_customerservice_team_member] table, which previously included the fields

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Account, **User**, and **Responsibility**. This fix script applies to all relationship tables in the base system.

The **Type** field references the related party configuration [sn_customerservice_related_party_configuration] table, a metadata table that enables administrators to define a **Type Configuration** for each responsibility. This field enables administrators to assign meaningful business names to responsibilities, reducing duplication. By internally referencing the same responsibility, the **Type** field simplifies data management and improves record consistency.

You can use the following procedure to populate the **Type** field using the fix script.

Procedure

1. Identify distinct Responsibility values in the relationship table that you want to update.
2. Create corresponding Type Configuration records in the related party configuration [sn_customerservice_related_party_configuration] table.
3. Run the following fix script to populate the **Type** field.

```
fixRelatedPartyTypeField(String tableName, String
 appliesTo, String entityType, String typeField, String
 responsibilityField)
/**
  * Fixes the related party type field in the specified table.
  *
  * @param tableName  The name of the table to update.
  * @param appliesTo  The value for the applies_to field.
  * @param entityType The value for the entity_type field.
  * @param typeField  The name of the type field to update. If
 null, defaults to FIELD_TYPE.
  * @param responsibilityField The name of the responsibility
 field to update. If null, defaults to FIELD_RESPONSIBILITY.
  */
```

Result

The fix script:

- Automatically populates the **Type** field for matching records in the selected relationship table.
- Maps existing responsibilities to their corresponding Type Configuration records.
- Processes updates in batches for optimized performance.
- Logs updates for reference.

Note: For large record volumes, run the fix script during system downtime to avoid performance impacts.

You can manually populate the **Type** field by navigating to the related party configuration [sn_customerservice_related_party_configuration] table and creating Type Configuration records for each distinct responsibility.

Example:

Suppose that you want that to populate the **Type** field in the account team member [sn_customerservice_team_member] table, where the table uses the following responsibilities:

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- Account Manager 1
- Account Manager 2
- Account Manager 3

1. Navigate to the related party configuration [sn_customerservice_related_party_configuration] table.
2. Create three Type Configuration records, one for each responsibility.
3. Run the fix script that automatically:
   - Maps each responsibility to its corresponding **Type**.
   - Populates the **Type** field for all records in the account team member [sn_customerservice_team_member] table.

Fix external user role assignments

You may have external users (contacts or consumers) on your instance that have been assigned internal roles. If so, you can use the Customer Service Management guided setup to evaluate and correct these role assignments as needed.

Because external users with internal roles can result in access issues, it's recommended that external users only be assigned external roles.

Use the tasks in the Fix External User Role Assignment category guided setup category to evaluate the contacts and consumers with the following role assignments:

- The snc_internal role only.
- The snc_internal role and one or more external roles.
- The snc_internal role and one or more additional internal roles.
- The snc_internal role and one or more additional internal and external roles.

Review the list of users in each group and tag those users with incorrect role assignments. Then run the scheduled job to fix the role assignments.

Note: You can also review and update external user roles using a query-based list. For more information, see KB0829930.

Using guided setup to fix external user role assignments

With the csm_guided_setup_user role, you can use guided setup to fix external user role assignments.

1. Navigate to **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Fix External User Role Assignment category, select **Get Started**.

   The Fix External User Role Assignment page opens with a list of tasks to evaluate groups of external users.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

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Fix External User Role Assignment tasks

The following table describes the different configuration tasks in the Fix External User Role Assignment category.

Fix External User Role Assignment tasks

Task	Description
External users with possible non-intentional internal role assignment	It's a set of contacts and consumers with the following role assignments: • The snc_internal role only. • The snc_internal role and one or more external roles. You must not assign internal roles to external users. Review the contacts in this list and fix the role assignment as needed.
External users with possible intentional internal role assignments	It's a set of contacts and consumers that have the following role assignments: • The snc_internal role and one or more additional internal roles. • The snc_internal role and one or more additional internal and external roles. You must not assign both internal and external roles to the same user. Review the users in this list and fix the role assignment as needed.
External users with intentional internal role assignments	It's a set of contacts and consumers that have the snc_internal role that is contained by another role. You must not assign internal roles to external users. Review the users in this list and fix the role assignments as needed.
Avoid such role assignments in future	To help prevent external users from being assigned the snc_internal role in the future, enable the following property: *glide.security.explicit_roles.enable_intern* Select **Configure** to navigate to the property and verify that the value is true. If false, set the value to true.

Fix roles for external users with possible non-intentional internal role assignments

Review and fix roles for external users that may have non-intentional internal role assignments.

Before you begin

Role required: csm_guided_setup_user, user_admin, sn_crm_foundation_admin, and system_scheduler_admin

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About this task

You must not assign internal roles to external users. Use this procedure to review and fix the contacts and consumers that may have the following role assignments:

- snc_internal role only
- snc_internal role and one or more external roles

Note: This guided setup task uses scheduled jobs to identify and fix role assignments. When fixing role assignments, the scheduled job fixes 3000 users at a time. If there are more than 3000 users in this group, change the configuration of the job so that it runs periodically.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Fix External User Role Assignment category, select **Get Started** and then select **External users with possible non-intentional internal role assignment**.
3. Run the scheduled job to tag users that may have non-intentional user role assignments. Users are tagged with the **Ext-user-non-intentional** tag.
4. Review the list of tagged users and remove the tag from any users for which you don't need to fix role assignments.
   If necessary, configure the list to display the Tag column.
5. Run the scheduled job to fix the role assignments for the users with the **Ext-user-non-intentional** tag.
   This scheduled job makes the following changes:
   - For users with the snc_internal role only, it removes the snc_internal role and adds the snc_external role.
   - For users with the snc_internal role and one or more external roles, it removes the snc_internal role.

   This scheduled job runs all the insert/deleted business rules on the User Role [sys_user_has_role] table.

Fix roles for external users with possible intentional internal role assignments

Review and fix roles for external users that might have intentional internal role assignments.

Before you begin

Role required: user_admin, sn_crm_foundation_admin, system_scheduler_admin, and csm_guided_setup_user

About this task

You must not assign internal roles to external users. Use this procedure to review and fix the contacts and consumers that may have the following role assignments:

- snc_internal role and one or more additional internal roles
- snc_internal role and one or more additional internal and external roles

Note: This guided setup task uses scheduled jobs to identify and fix role assignments. When fixing role assignments, the scheduled job fixes 3000 users at a time. If there are more than 3000 users in this group, change the configuration of the job so that it runs periodically.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Fix External User Role Assignment category, select **Get Started** and then select **External users with possible intentional internal role assignments**.
3. Run the scheduled job to tag users that may have intentional user role assignments.
   Users are tagged with the **Ext-user-intentional** tag.
4. Review the list of tagged users and remove the tag from any users for which you don't need to fix role assignments.
   If necessary, configure the list to display the Tag column.
5. Run the scheduled job to fix the role assignments for the users with the **Ext-user-intentional** tag.
   This scheduled job makes the following changes:
   - For users with the snc_internal role and one or more additional internal roles, it removes the snc_internal role and all other internal roles, and adds the snc_external role.
   - For users with the snc_internal role and one or more additional internal and external roles, it removes the snc_internal role and all other internal roles.

   This scheduled job runs all the deleted business rules on the User Role [sys_user_has_role] table.

Fix roles for external users with intentional internal role assignments

Review and fix roles for external users that have intentional internal role assignments.

Before you begin

Role required: user_admin, sn_crm_foundation_admin, system_scheduler_admin and csm_guided_setup_user

About this task

You must not assign internal roles to external users. Use this procedure to review and fix the contacts and consumers that have the snc_internal role contained by another role.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Fix External User Role Assignment category, select **Get Started** and then select **External users with intentional internal role assignments**.
3. Run the scheduled job to tag users that have intentional user role assignments.
   Users are tagged with the **Ext-user-contained-role** tag.
4. Review the list of tagged users.
5. Manually fix the role assignments for the desired users.

Avoid future internal role assignments for external users

Enable a property to avoid external users from being assigned the snc_internal role.

Before you begin

Role required: csm_guided_setup_user and security_admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Fix External User Role Assignment category, select **Get Started** and then select **Avoid such role assignments in future**.
3. Set the *glide.security.explicit_roles.enable_internal_user_blacklist* property to true.

Product data

Configure product data for Customer Service Management including product models, sold products, install base items, and installed products.

Setting up users, user groups, and customer relationships

Task	Description
Configure product data	Configure the product data for your company, including: • Product models: Goods or services that your company sells and supports. • Sold products: The products and components that have been sold to an account or a consumer. • Install base items: Items that represent the instances that have been installed or provisioned for a customer. • Installed products: Information about sold products and how they are deployed or installed.
Configure assets	An asset is a specific product or instance that is supported for an account or consumer.
Create asset contact relationships	Assign an asset to a customer contact who is responsible for managing that asset.
Create service contracts	Service contracts define the type of support that accounts and consumers receive for their products.
Configure entitlements	Entitlements define the type of support that an account or consumer receives as well as the supported communication channels.
Configure Customer Contracts and Entitlements	Use the Post-Sales Support application to configure and display customer service contracts and entitlements.
Use Customer Life Cycle Management Workflows to manage the life cycle of your sold products	This application enables you to update the existing configurations and to modify, suspend, resume, or disconnect the sold products and their complete hierarchy.

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Setting up users, user groups, and customer relationships (continued)

Task	Description
Create CRM Core for products and services	Use these workflows to analyze business opportunities and customer leads as well as the billing, support, and maintenance requirements after a sale is complete.

Configure product data

Configure product data including product models, sold products, install base items and installed products.

Before you begin

Role required: admin

About this task

- **Product models:** A product is a type of good or service that your company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables.

  Note: Product models require the Model Management plugin (com.snc.model).

- **Sold products:** The products and components that have been sold to an account or a consumer.
- **Install base items:** Items that represent the instances that have been installed or provisioned for a customer.
- **Installed products:** Provide information on the sold products and how they are deployed or installed. Use installed products to create an association between sold products and install base items.

Procedure

- You can import the following product data using guided setup.
  - Import product models with guided setup
  - Import sold products with guided setup
  - Import install base items with guided setup
  - Import installed products with guided setup
- You can create new product data using the Customer Service Management application.
  - Create a product model
  - Create sold products
  - Create install base items
  - Create installed products
- You can configure the following relationships and associations after importing or creating product data:
  - Product models
    - Associate service offerings to product models
    - Configure product model and catalog item relationships
  - Sold products

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- Associate service offerings with sold products
- Associate sold products with contracts

Product models

Configure product models, such as service, hardware, software, or consumables that your company sells and supports.

Task	Description
Import product models with guided setup	Prepare and import data for each type of product model in a different table.
Create a product model	Create a record for a specific version or configuration of a product type that your company sells and supports.
Associate services with product models	Associate one or more service offerings to a product model to enable customers to choose service offerings for products.
Configure product model and catalog item relationships	Create relationships between product models and catalog items so that your customers can request services for products.

Import product models with guided setup

A product is a type of good or service that your company sells and supports. Product models identify different types of products, such as service, hardware, software, or consumables.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Information for each type of product model is stored in a different table. For example, service product models are stored in the Service Model [cmdb_service_product_model] table.

Note: Product models require the Model Management plugin (com.snc.model).

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Product Models**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create a product model

Create a record for a type of product that your company sells and supports.

Before you begin

Role required: model_manager

Confirm that the Model Management plugin (com.snc.model) is installed.

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About this task

A product model is a specific version or configuration of a product. Build hierarchical product models that represent the set of products that your organization offers to its customers and define relationships between different product models. Define whether a product is tracked as an asset, a CI, or both. Additionally, identify or create the CI and asset classes to capture configuration information for product models.

Product models provide customer service agents and customers with a common understanding of the products being used by a particular customer. Customers can view the products purchased on the Customer Service Portal and can open cases for any issues they are facing.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Product Models**.
2. Select **New**.
3. Select the type of product model to create:
   - **Application Model**
   - **Consumable Model**
   - **Contract Model**
   - **Facility**
   - **Hardware**
   - **Service**
   - **Software**
4. Fill in the fields for the selected product model as appropriate.
   See Model form fields for field descriptions.
5. Select **Submit**.

Note: In the **Sold Product** related list, you can see all the accounts and consumers that the product model has been sold to.

Associate services with product models

Enable customers to select services for products by associating services with product models.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

One product model can have multiple associated services.

Procedure

1. Navigate to **All** > **Customer Service** > **Product Models**.
2. Select a product model.
3. Configure the form to display the Services related list.
   For more information, see Add a related list to a form.
4. On the Services related list, click **New** or **Edit** to add an existing service offering to the product model.

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Configure product model and catalog item relationships

Enable customers to request services for the products that they own. Create definitions for the services that support your products and then configure service definitions to associate them with the appropriate products and catalog items.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

Use the Service definitions feature to create definitions for the services that are offered to support your products. This feature is available with the Customer service case types plugin.

From the Customer and Consumer Portals, end users can select available services from the Services portal widget. Selecting a service displays the record producer associated with the service definition. Submitting the record producer creates a case of the correct case type.

Procedure

1. Create a service definition.
2. Associate a product with a service definition.
3. Associate one or more catalog items with a service definition.

Related topics

View product information from the Customer Service Portal

Configure install base

Track which products and services have been purchased by a customer, how they've been installed or provisioned, along with the detailed configuration for each installed item.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Install the Customer Install Base Management plugin (com.snc.install_base) from the ServiceNow Store.

Capture the install base for a customer by creating sold products, install base items, and installed products. This would enable the customer service agents to trace issues back to the relevant product, instances of that product, and other entities impacting their functioning.

Before setting up your install base, create your product data by creating or importing product models. For more information, see Configure product data.

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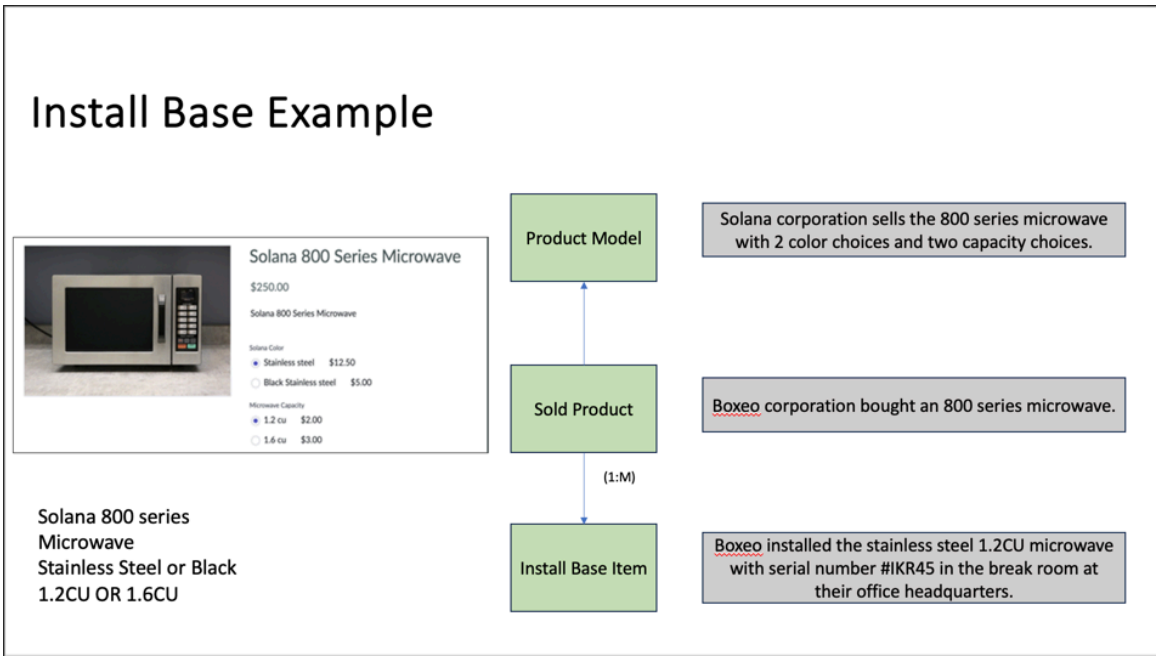
Using install base management

This example shows the summary of the customer's purchase on the Solana microwave.



There are three parts to setting up your install base.

Customer install base management plugin description

Sold Products	Create a sold product to provide customers, consumers, and customer service agents visibility into the products and services sold to an account or a consumer.
Install Base Items	Create an install base item to track instances that have been provisioned for an account or consumer. An install base item can be any configuration item that has been made accessible to customers. For Software as a Service (SaaS) products, an install base item refers to an application service configuration item.
Installed Products	Create an installed product to track information on the instances that a sold product is deployed on at an account or consumer. A sold product can have multiple installed product records depending on the number of instances of the product in use.

You can create sold products, install base items, and installed products as individual records, import them in bulk, or create them from an Account or Consumer record.

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Customer service agents can view install base information in Agent Workspace. Customers can view install base information on the Customer Service Portal.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Foundation Data category, view the list of tasks to configure the feature.

Install base description

Task	Description
Import Sold Products	Import sold products to track the products or services sold to an account or consumer.
Import Install Base Items	Import install base items that represent the items installed or provisioned for a customer.
Import Installed Products	Import installed products to create an association between sold products and install base items.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Sold products

Create or import sold products to track products and services sold to accounts or consumers. Customers, consumers, and customer service agents can view sold products. A sold product can have child and parent sold items in a hierarchical structure.

Sold products are products and components that have been sold to an account or a consumer. You can view which products and components have been sold to see an overview for that account or consumer. A sold product can have child and parent sold products in a hierarchical structure. For example, if issues arise with a configuration item, customer service agents can trace which sold product is affected on the Case form.

From the Sold Products form, you can edit install base items, create entitlements and cases, and add contracts. To learn more about creating entitlements, see Create an entitlement.

Setup sold products

Task	Description
Import sold products with guided setup	Use guided setup to import sold products so that you can track the products or services sold to an account or consumer.
Create a sold product	Create a sold product to track the products or services that are sold to an account or consumer.
Associate service offerings with sold products	Associate a service offering with a sold product to provide customer service agents visibility into sold products and their service offerings.

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Setup sold products (continued)

Task	Description
Associate sold products with contracts	Associate sold products to contracts to capture complete information on a customer's install base.

Import sold products with guided setup

Sold products are products and components that have been sold to an account or a consumer. Use guided setup to import sold products so that you can track the products or services sold to an account or consumer.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

This provides an overview of the complete product sold to an account or consumer. A sold product can have child and parent sold items in a hierarchical structure.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Sold Products**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create a sold product

Create a sold product to track the products or services that are sold to an account or consumer.

Before you begin

Verify that the Customer Install Base Management (com.snc.install_base), Customer Service with Service Portfolio Management (SPM) (com.snc.csm_spm), and the Product Catalog Management Core (com.sn_prd_pm) plugins are installed.

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to the CRM Workspace.
2. Select the list icon.
3. Select the Sold Products list.
4. Select **New**.
5. On the Sold Product form, fill in the fields.
   To learn more about the descriptions, see Sold product form.
6. Select **Save**.
   The Child Sold Products, Install Base Items, Cases, Entitlements, Contracts, Additional Contacts, and Additional Consumers related lists are displayed.
7. Fill in the related lists as required.

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Sold product related lists

Related list	Description
Child Sold Products	Create a child sold product by selecting **New**.
Install Base Items	Edit an install base item by selecting **Edit**.
Cases	Add a case to the sold product by selecting **New**. The system displays any open cases that are related to the sold product automatically.
Entitlements	Add an entitlement for the sold product by selecting **Select**. **Note:** Customer service managers create entitlements. Customer service agents can view entitlements.
Contracts	Associate a contract with the sold product by selecting **Edit**. **Note:** You can also associate a contract with a sold product from the Service Contracts form. Customer service managers associate the contracts to the sold products. Customer service agents can view the contract information.
Additional Contacts	Add additional contacts to the sold product by selecting **New**. You can associate a contact with a sold product by defining its name and responsibility. The additional contacts added can be from the same account, partner account, or contact relationship. You can see the Additional Contacts related list for the sold products that are associated with the B2B account. **Note:** Starting with the Utah release, the sn_install_base_rel_soldproduct_to_contact table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the sold product related parties table [sn_install_base_sold_product_related_party].

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Related list	Description
Additional Consumers	Add additional consumers to the sold product by selecting **New**. You can associate a consumer with a sold product by defining its name and responsibility. You can see the Additional Consumers related list for the sold products that are associated with the B2C account. **Note:** Starting with the Utah release, the sn_install_base_rel_soldproduct_to_contact table has been deprecated for new customers. For upgrade customers, the table continues to be supported and extends the Sold Product Related Parties table [sn_install_base_sold_product_related_party].
Sold Product Related Parties	Add contacts, accounts, consumers, and channel partners as related parties by selecting **New**. The **from header** indicates whether a record is copied from an order header or order line. The field is used as a flag to differentiate the source of the record. Contacts, accounts, and consumers can login and access the sold products, however, currently channel partners are only added as a record for book keeping.

Note: For business-to-business and business-to-consumer, you can see both the additional contacts and additional consumers in the sold product related lists and you can also add new records.

8. Select **Update**.
   The sold product is added to the account or consumer that you selected. Select an account or consumer to see a list of all sold products that are related to the account or consumer. You can also view a list of sold products according to the product model.

   Note: You can also create sold products directly from an account or a consumer.

   a. Navigate to **Customer Service** > **Customer** > **Accounts** or **Customer Service** > **Customer** > **Consumer**.
   b. Select an account or a consumer.
   c. Select the Sold Products related list.
   d. Select **New**.

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Related topics

Create and manage sold products for a business location

Edit a contract

Create an entitlement

Associate service offerings with sold products

Associate a service offering with a sold product giving customer service agents visibility into sold products and their service offerings.

Before you begin

Role required: sn_customerservice_manager or admin

Ensure that the Customer Service with Service Portfolio Management (SPM) plugin (com.snc.csm_spm) is installed.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the desired record where you want to associate service offerings.
3. In the **Service Offering** field, select an existing service offering.

   Note: The **Service Offering** field may not appear by default in the user interface. If this happens, add **Service Offering** field using the form layout.

4. Select **Update**.

Related topics

Create a service offering

Associate sold products with contracts

Capture complete information on a customer's install base by associating sold products to contracts.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

Associate sold products to contracts so that your customer service agents working on cases can:

- Check a sold product and view any contracts that exist for the sold product.
- View which products have been sold to the customer under the contract.
- Track when sold products were added to the contract, and how long they are covered for.

You can also associate a sold product with a contract from the Sold Product form.

A sold product can be part of multiple contracts. If a sold product is deleted, it is also deleted from any associated contracts. If a contract is deleted, the sold product remains.

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Service Contracts**.
2. Select a contract you want to add a sold product to.
3. On the **Products Covered** related list, select **New** to associate sold products to the contract.

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The list of sold products is filtered based on the account.

Select **Run filter** to see a list of all sold products. You can only add the sold products that belong to the account selected or to the account hierarchy.

4. Select **Save**.
5. On the **Products Covered** related list, select the **Add All Child Sold Products** related list action to add all child sold products to the contract without having to select each item individually.
6. Select **Update**.

Install base items

Create an install base item to track instances that have been provisioned for an account or consumer. An install base item can be any configuration item that has been made accessible to customers. For Software as a Service (SaaS) products, an install base item refers to an application service configuration item.

Task	Description
Import install base items with guided setup	Use guided setup to import install base items so that you can track instances that have been provisioned for an account or consumer.
Create an install base item	Create an install base item that represents the instance of the product that has been configured for a customer. The install base item enables you to track all the purchases that were made by a customer.
Associate multiple install base items to a case	Associate one or more related install base items to a case to access all the install base items that are associated to the parent install base item.
Install base characteristics	Configure characteristics of install base items to provide information about the service requirements to timely maintain services for the install base item.

Import install base items with guided setup

Install base items represent the instances of the product that have been configured for a customer.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Each install base item references the configuration item record for the customer.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Foundation Data category, select **Get Started** and then select **Import Install Base Items**.
3. Upload data from an external data source into an import set.
4. Create a transform map.

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5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create an install base item

Create an install base item in the Customer Service Management application that represents the instance of the product that has been configured for a customer. The install base item enables you to track all the purchases that were made by a customer.

Before you begin

Verify that the Customer Install Base Management plugin (com.snc.install_base) is installed.

Role required: sn_customerservice_manager or admin

About this task

An install base item is any configuration item (CI) that has been made accessible to customers. For Software as a Service (SaaS) products, an install base item refers to an application service configuration item. Each install base item references the configuration item record for the customer. If issues arise with a configuration item, customer service agents can trace which install base items that the case is affecting.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Select **New**.
3. On the form, fill in the fields.

Install Base Item form

Field	Description
Number	Unique ID of the install base item. This field is automatically filled in, but you can change it.
Name	Name of the install base item.
Configuration Item	Configuration item that is associated with the install base item. The sn_customerservice_manager role must also have the app_service_user role to create the install base items for the Application Service configuration item class. For more information, see Application services. Service models have a model category called the Application Service, which links a service model to the Application Service CI class. For more information, see Models and Model categories.
Buyer Organization	Internal or external entity that is involved in providing service to the customer. **Note:** If you select a buyer organization, the **Account**, **Contact**, and **Consumer** fields are hidden. The **Buyer Organization** field is active only when the Service Organization (com.snc.service_organization) plugin is installed.
Account	Account that is associated with the install base item.

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Field	Description
	Note: If you enter an account, the **Consumer** field is hidden. The Consumer field is active only when the B2B2C plugin is installed.
Contact	Account contact that is primarily responsible for the install base item.
Consumer	Consumer that is associated with the install base item. **Note:** The Account field is hidden if the **Consumer** field is entered first.
Owned by	Business manager of the install base item. If the business manager is entered in the configuration item, this field is automatically filled in with the information from the configuration item.
Supported by	If the CI contains this information, this field is automatically filled in with the information from the configuration item.
Service Context	Service that is associated to the underlying CI for calculating the impact severity from Event Management. For more information, see Service health status for install base. **Note:** This field is only available if you have the Proactive Customer Service Operations with Event Management plugin installed. The health status of an install base item appears only if an install base item has a CI and a service context that is associated to it. Configure the form layout to add this field.
Parent install base item	Install base item that is the parent of the current install base item.
Root install base item	Install base item that is used to fetch the entire install base hierarchy in a single query.
Household	Household that is associated with the install base item. **Note:** This field is available only when the Customer Household Data Model (com.snc.household) plugin is installed.
Product	Product model that is associated with an install base and is used to identify the services that are associated with any product model. **Note:** A product model must have a single specification. The specification that is associated to the product model appears only on the install base form.
Location	Location that is associated with the product.
State	Current state of the Install base item and represents the various phases of the life cycle. **Note:** The state of the install base item determines the **Active** field and the **Uninstall date** field on the install base form.
Status	Option that determines whether the product is original or a replacement.

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Field	Description
Life cycle stage	CSDM life cycle stage of an install base item.
Life cycle stage status	CSDM life cycle stage status of an install base item.
Active	Option that represents whether the install base is active or inactive. If the state is active, related cases for a product can be created. **Note:** A sync between the active state, install date, and uninstall date is present. On the install base form, if the **State** is **In Use**, it means that the **Active** option is selected. The **Active** option remains unselected if the **State** is set to **Inactive**.
Install date	Date on which the install base is active.
Uninstall date	Date on which the install base is inactive.
Asset	Asset that is associated with an install base.
Specification	Specification that is associated with an install base item. Option that helps in fulfilling orders to create an install base item and its hierarchy. **Note:** The **Specification** field appears only to CSM agents, managers, and contributor persona.
Install base identifier	Identify finished goods in the system using their unique identifier.
Provider organization	The service organization that sells and supports the products or services owned by the customer.

Note: In the List view of the install base item, you can filter the data by Condition, Active, Uninstall Date, and Asset.

4. Right-click the form header and select **Save**.
   The Sold Products, Entitlements, and Cases related lists are displayed.
5. Fill out the related lists as described in the following table.

Install base item related lists

Related list	Description
Child Install Base items	List of all child install bases that are related to the parent install base item.
Sold Products	List of the sold products that are associated with an install base Item. Edit a sold product by selecting **Edit**.
Cases	List of cases that are associated with an install base item.
All Cases	List of all cases that are related to an install base in the install base hierarchy.

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Related list	Description
	Note: The All Cases related list appears only when an install base hierarchy is added to the Install base item.
Entitlements	List of entitlements that are associated with an install base item. Add an entitlement for the install base item by selecting **New**. **Note:** Customer service managers can create entitlements. Customer service agents can view entitlements.
Contracts	List of contracts that are related to an install base. Edit a contract by selecting **Edit**.
Install Base Related Parties	List of contacts, consumers, accounts, members, contributors, and service organizations that have access to an install base. For more information on Install Base Related Parties, see Create related party configurations.

For more information on related lists, see Related list for an install base item.

6. Select **Update**.
   The install base item is added to the account or consumer that you selected. You can select an account or consumer to see a list of all the install base items that are related to the account or consumer.

   Note: You can also create install base items directly from an account or a consumer.

   a. Navigate to **Customer Service** > **Customer** > **Accounts** or **Customer Service** > **Customer** > **Consumer**.

   b. Select an account or a consumer.

   c. Select the Install Base Items related list.

   d. Select **New**.

Related topics

Create and manage install base items for a business location

Related list for an install base item

In the Customer Service Management application, you can use the Install base related list to track information that is related to the install base hierarchy, cases, entitlements, and other entities. By using these tables, you can understand your customers' purchases and provide efficient post-sales support.

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Related list for install base item

Related list	Description
Create a child install base item	List of all the child install base items associated to the parent install base item.
Sold Products	List of all the products or services sold to a customer. For more information on how to create a sold product, see Create a sold product.
Cases	List of all the cases associated to the current install base item. The list of cases enables customer service agents to access all the cases and issues that are related to an install base in one place. For more information on cases and case access, see Service Model Foundation cases.
All Cases	List of all the child cases associated to the parent install base item. **Note:** You cannot see the parent cases that are associated with a child install base item.
Create an entitlement	List of the existing cases for an account, product, or service contract that defines the type of support that a customer receives. For more information on entitlements, see Configure entitlements.
Edit a contract	List of all the contracts associated to the current install base item.
Install Base Related Parties	List of all the additional parties that have access to an install base item. You can add related parties only to the root install base item. For more information to the list of related parties and default responsibilities, see Create related party configurations. To add a related party to an install base, see Add related parties to an install base item.

Create a child install base item

Create a child install base item in the Customer Service Management application to view a list of all the cases and issues of the parent install base item.

Before you begin

Role required: admin and sn_customerservice_manager

About this task

A child install base related list provides the information about all the child install bases of the current install base item.

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Procedure

1. Navigate to **All** > **Customer Service** > **Product** > **Install Base Item**.
2. In the related list section of the Install base form, select an install base item and open **Child Install Base Items**.
3. Select **New.**
   The **Parent install base item** field on the new install base form is automatically filled or defaulted to the current install base selection. The **Account** and **Contact** fields are automatically filled in on the child install base form.
4. Select **Submit**.

Create an entitlement

Create an entitlement in the Customer Service Management application to view the existing cases for an account, product, or service contract. Creating an entitlement helps you to understand the level of support and the communication channels that an agent can use.

Before you begin

Role required: admin or sn_customerservice_manager

About this task

Create an entitlement to define the type of support that a customer receives.

Procedure

1. Open an install base item and from the related list, select **Entitlements**.
2. Select **New**.
3. On the form, fill in the fields.
   For more information, see Configure entitlements and Create entitlements for CSM entities.
4. Select **Submit**.

Edit a contract

Enable an agent or manager to edit an open contract that is related to the parent install base item in the Customer Service Management application.

Before you begin

Role required: admin or sn_customerservice_manager

About this task

The Contracts related list provides a list of all the contracts that are related to the current install base item.

Procedure

1. Open an install base item and from the related list, select **Contracts**.
2. To edit a contract, select **Edit**.
3. From the list of contracts, select the contract that you want to link to the install base item.

   Note: The list of contracts that are displayed are related to the **Account** option that you selected in the Install Base form.

4. Select **Save**.

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Associate multiple install base items to a case

In the Customer Service Management application, you can associate one or more related install base items to a case to access all items associated with the parent install base item.

Before you begin

Role required: sn_customerservice_manager and admin

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **All**.
2. Open the case that you want to associate the multiple install base items to.
3. Open the Affected Install Base Items related list.
4. Select **Edit**.
5. From the existing list of install base items in the **Collection** box, select the install base that you want to add by selecting the right arrow.
   The install base that you select is displayed in the **Affected Install Base Items List** box.
6. Select **Save**.

Related topics

Create an install base item

Install base characteristics

Customer service managers can create characteristics of install base items. Administrators can capture and track these characteristics by using the Customer Service Management application. These characteristics provide information about service requirements and verify timely maintenance services.

Overview of install base characteristics

Install base characteristics enable flows like case management, field service management, planned maintenance, and reactive service requirements to occur on a schedule. Some install base characteristics are configurable and vary from product to product. The product model characteristics are non-configurable and are directly taken from the product model that is associated with the install base item.

Only users with the sn_customerservice_manager role can create the characteristics for the install base items. Users with the administrator role can activate the Install base characteristics plugin [com.snc.install_base_characteristics] to capture and view all the install base characteristics on the Install base form. To activate the plugin, see Activate a plugin.

The Install base characteristics data model represents how the characteristics of an install base item are stored. To learn about the different fields and tables that they're stored in, see Data model for the Install base item characteristics.

Roles

With the admin role, you can track the characteristics to provide the required product information to administrators, agents, business stakeholders, and customers. You can also track the services that are associated with an install base item at the time of purchase. With this role, you can capture the configurable and non-configurable characteristics to view the configuration specifications for an install base item.

With the sn_customerservice_manager role, you can create a set of configurable characteristics for an install base item on the Customer Service Management (CSM) application. It enables you

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to view the install base item details and its associated services. After you create an install base characteristic, the characteristic appears in the related list on the install base item form. For more information, see Create install base characteristics for an install base item.

There are different functional and granular roles to provide varying levels of permissions to users. For information on the different access levels, see Security roles for the install base characteristics.

Install Base characteristics

The install base characteristics are stored in the Install Base Characteristics table [sn_install_base_item_characteristic]. However, both the install base and product model characteristics are displayed in the Install base characteristics and product model related lists on the install base form. You can use the text search option on the Customer Service platform and portals to search for the characteristics on the Install Base characteristics table.

You can view the install base characteristics on the Customer Service, Consumer Service, and Business Location Service Portal (BLSP).

Under the **Support** header on the portals home page, you can view the information about the install base characteristics that are associated with the parent install base item. The characteristics that are associated with the child items aren't visible on the portals. For more information about the install base items from the Customer Service Portal, see View install base information from the Customer Service Portal.

Data model for the Install base item characteristics

The data model for the install base item characteristics represents how the characteristics of an install base item are stored in the Customer Service Management application. The data model refers to the characteristic values and options and provides a view of how to store a set of characteristics associated to an install base item.

The Customer Service Management application has several functional and granular roles that provide access levels to create, read, and update characteristics for an install base item. The install base item characteristics table [sn_install_base_item_characteristic] comes with different security roles and plugins. For more information on security roles, see Security roles for the install base characteristics.

The following diagram shows the data model for the Install base characteristics. The data model represents the new and existing install base item and install base item characteristics tables.

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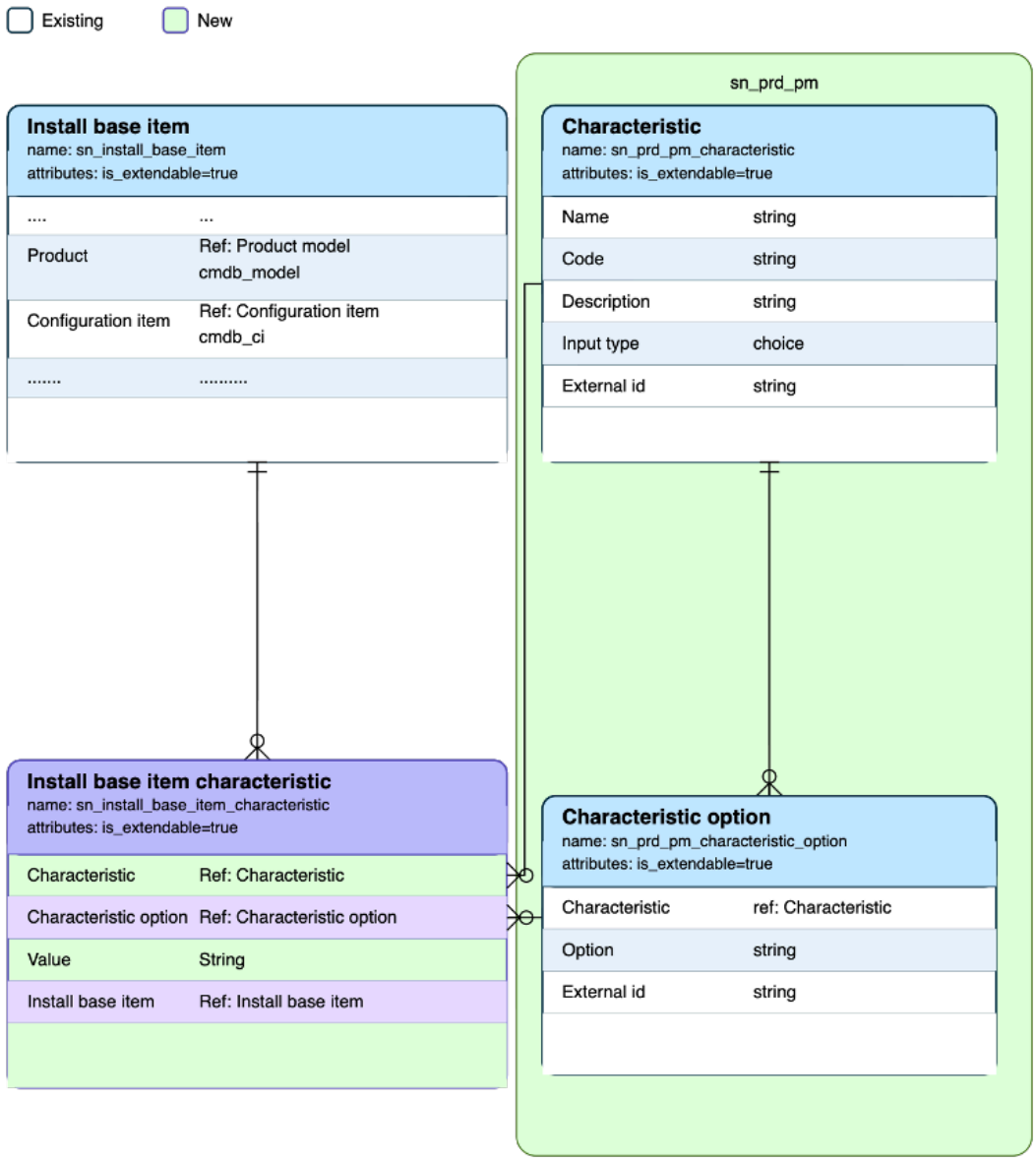
Data model for Install base characteristics



The following table describes the different fields on the Install base characteristics form.

Install base item characteristics table

Field	Description
Characteristic	Characteristic that is associated with the install base item.

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Install base item characteristics table (continued)

Field	Description
Characteristic option	Characteristic option that you chose from a list of options for the selected characteristic. **Note:** This field is available when the characteristic that you select is a choice, Boolean, or check box type of option.
Value	String value for the selected characteristic. **Note:** This field is available when the characteristic that you select expects a string input and isn't a choice, Boolean, or check box type of option.
Install base item	Install base item that the characteristics are added to.

Security roles for the install base characteristics

You can assign functional and granular roles to Customer Service Management (CSM) users and administrators so that they can access the different capabilities and features of the install base characteristics.

Functional and granular roles come with varying levels of permissions for the configuration of install base characteristics on the Customer Service Management (CSM) application.

The following tables describe the different functional and granular roles and their descriptions.

Functional roles for the install base characteristics

Role title	Required Plugin	Description	Contains roles	Added to roles
sn_install_base.install_base_viewer	Customer Install Base Management [com.snc.install_base_management] and Product Catalog Management Core] [sn_prd_pm plugin	This role provides read access to install base item, its characteristics, and all the product model characteristics. This role is intended for internal users only.	• sn_ib_chars.install_base_item_characteristics_read • sn_prd_pm.product_model_characteristic_viewer • sn_install_base.install_base_read_granular	sn_install_base.install_base_mana
sn_install_base.customer_install_base_viewer	Customer Install Base Management [com.snc.install_base_management] and Product Catalog Management	This role provides read access to install base item, its characteristics, and only the	• sn_ib_chars.install_base_item_characteristics_read • sn_prd_pm.product_model_characteristic_granular • sn_install_base.install_base_read_granular	None

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Functional roles for the install base characteristics (continued)

Role title	Required Plugin	Description	Contains roles	Added to roles
	Core [sn_prd_pm plugin]	customer visible product model characteristics. This role is intended for external users only.		
sn_install_base.install_base_manager	Customer Install Base Management [com.snc.install_base_cmdb]	This role provides access to manage the install base items and their characteristics. This role is intended for internal users only.	• sn_ib_chars.install_base_item_characteristics_write • sn_ib_chars.install_base_item_characteristics_crea • sn_install_base.install_base_viewer	None

Granular roles for the install base characteristics

Role title	Required Plugin	Description	Contains roles	Added to role
sn_ib_chars.install_base_item_characteristics_read	Customer Install Base Characteristics [com.snc.install_base_cmdb]	This role provides granular read access to install base characteristics.	sn_prd_pm.characteristics_viewer	• sn_ib_chars.install_base_item_c • sn_ib_chars.install_base_item_c • sn_install_base.install_base_vie • sn_install_base.customer_instal
sn_ib_chars.install_base_item_characteristics_create	Customer Install Base Characteristics [com.snc.install_base_cmdb]	This role provides granular create access to install base characteristics.	sn_ib_chars.install_base_item_characteristics_read	
sn_ib_chars.install_base_item_characteristics_write	Customer Install Base Characteristics [com.snc.install_base_cmdb]	This role provides granular write access to install base characteristics.	sn_ib_chars.install_base_item_characteristics_read	

Customer roles for the install base characteristics

Role title	Required Plugin	Description	Contains roles	Added to role
sn_customerservice.customer	Customer Management Core [com.sn_customerservice]	This role provides access to research and manage install base items and their associated characteristics.	sn_esm_user,snc_external	None

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Customer roles for the install base characteristics (continued)

Role title	Required Plugin	Description	Contains roles	Added to role
		Users with this role can view install base items, including all related characteristics and assets associated with their accounts. This role is intended for external users only.		

For more information on the customer roles, see Roles installed with Customer Service Management.

Create install base characteristics for an install base item

Create a set of configurable characteristics for an install base item on the Customer Service Management (CSM) application. You can then view the details about the install base item and the services that are associated to it.

Before you begin

Role required: sn_customerservice_manager

About this task

Each product has its own set of attributes, some of which are configurable by the user and some that are non-configurable.

Configurable characteristics are a set of characteristics related to an install base item that the user can choose or customize at the time of purchase. These characteristics differ from user to user and product to product.

Non-configurable characteristics are a set of fixed characteristics related to an install base item that can't be chosen or customized by the user at the time of purchase.

To know more about characteristics, see Install base characteristics.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Open an install base item from the list.
3. Navigate to the Install Base Characteristics related list.
4. Select **New**.
5. In the **Characteristic** field, select a characteristic.

   Choose a string type or value for the **Characteristic** field. If the characteristic field has a string type, then the **Value** field appears as shown in the following example.

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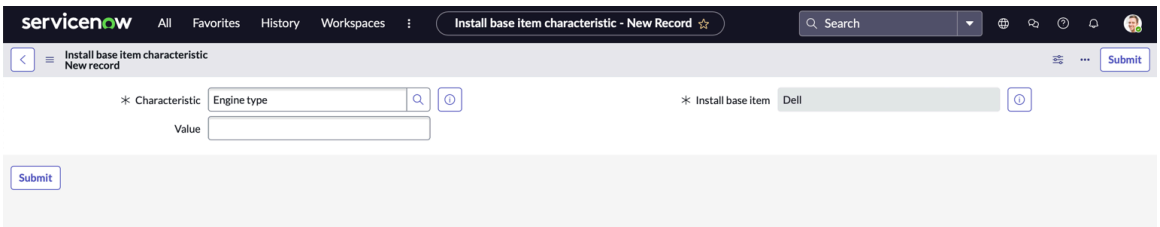
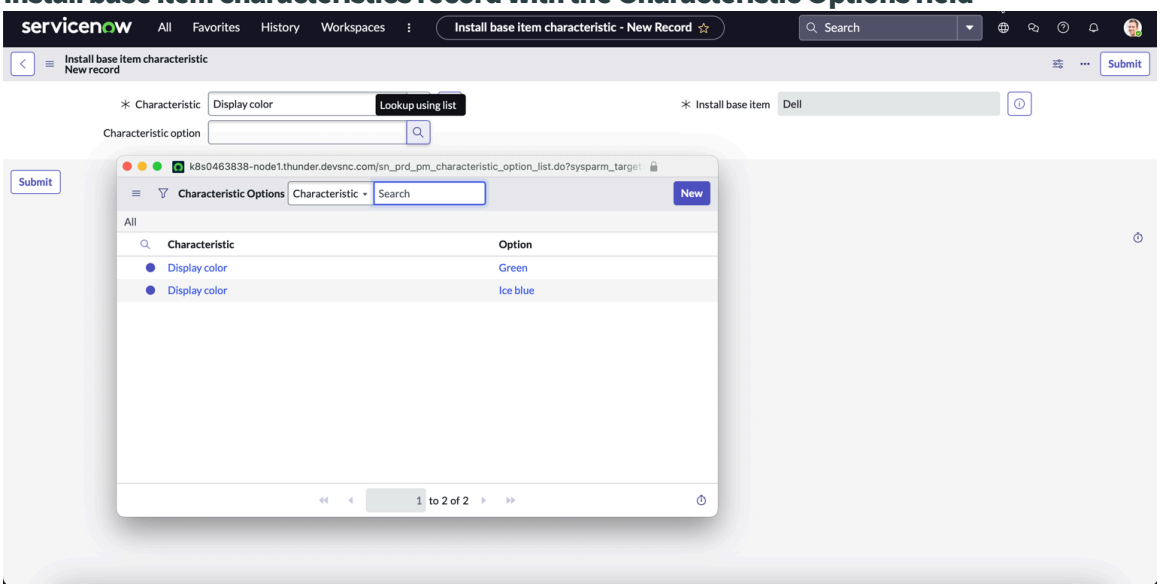
Characteristics record with the Value field



If the characteristic field has an option, then the **Characteristic option** field appears as shown in the following example.

Install base item characteristics record with the Characteristic Options field



6. Select **Submit**.

Result

After creating an install base characteristic, the characteristic appears in the related list on the install base item form.

Related topics

Install base characteristics

Data model for the Install base item characteristics

Synchronizing an asset class with a configuration item class and install base class

You can synchronize the asset class, configuration item (CI) class, and the install base class by mapping the model categories in the Customer Service Management (CSM) application. With this synchronization, the data can flow between the different entities because the same information is replicated on both entities.

Overview of synchronization

By mapping the install base class, configuration item class, and asset class fields, you can synchronize the information on both the install base item and the asset form. This mapping creates a bidirectional synchronization. For example, you can update any one of the **Location**, **Install date**, **Consumer**, **Account**, **State**, and **Contact** fields on the install base item form to create a synchronization between the install base item and the asset form. For more information on the different fields on the install base form, see Create an install base item.

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Note: You must update the **Consumer** and **Account** fields from the install base item to synchronize the updates to the asset form. Updating the fields on the asset form doesn't synchronize the updates to the install base item.

Install Base item class

The Install Base item class on the model category form only displays the tables that extend from the install base table [sn_install_base_item]. If the install base table has no extensions, no options are displayed in the Install Base Class list. You can create a synchronization between an install base record and an existing associated record by using the following sample migration script.

```
var ibClasses = []; //If the list is empty, system will fetch
 model categories for all Install base item classes
var assetIBIntegrationUtil = new
 sn_install_base.AssetIBIntegrationUtils();
assetIBIntegrationUtil.syncExistingInstallBaseRecordsToAsset(ibC
lasses)
```

Product instance identifier

The product instance identifier helps to avoid creating duplicate records by tracking install base items and their corresponding assets. The product instance identifier applies to all the extensions of the install base [sn_install_base_item] table.

Note: The **Is product instance** flag on the Model Category form is read-only by default and is marked true for selective model categories only. The product instance identifier is a hash value and not a user-friendly field.

Product instance hierarchy for Install Base Management

Adopt the product instance hierarchy into Install Base Management to maintain a synchronization between an asset and an install base item in the Customer Service Management application.

Enable the product instance to create a synchronization for all changes that occur in the asset hierarchy to automatically reflect in the install base hierarchy. An install base item hierarchy depends on the hierarchy of its associated assets. The Install base hierarchy mirrors its corresponding asset model hierarchy for both the parent and child install base items.

Note: All the instances in the hierarchy must belong to the same model category.

Synchronize install base life cycle fields with state and status fields

Synchronize the **Life cycle stage** field and the **Life cycle stage status** fields with the **State** and **Status** fields on the install base form so that you can track the life cycle of an install base entity.

Overview of the life cycle

Track the life cycle of an install base entity by migrating to the Common Service Data Model. To learn more about the CSDM framework, see Common Service Data Model framework for Install Base Management.

Life Cycle Mapping table

The Life Cycle Mapping [life_cycle_mapping] table is already populated with life cycle mapping values and choices. Use these values to synchronize the **Life cycle stage** and **Life cycle stage status** fields with the **State** and **Status** fields on the install base form.

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The mapping record maps the **State** fields with their corresponding life cycle fields on the install base form. The **In Use** and **InActive** options are available in the **State** field and their corresponding mappings are available in the Life Cycle Mapping [life_cycle_mapping] table. With these default options, you can initiate a synchronization with the life cycle fields.

You can create custom choices for the **State** and **Status** field by adding a mapping record in the Life Cycle Mapping [life_cycle_mapping] table. Each custom value has related records on the Life Cycle Mapping [life_cycle_mapping] table. You must activate the mapping records for the synchronization to begin.

For information on how to create the custom choices and then map the **Life cycle stage** and **Life cycle stage status** fields with the legacy **State** field, see Enabling life-cycle synchronization from legacy to asset.

Note: If the custom choices have no life cycle mappings, then the **Life cycle stage** and the **Life cycle stage status** fields remain in the **To Be Determined** state.

Migration of the Install Base table

If you don't want to activate all the tables and records in the CSDM framework, you can migrate only the Install Base table (sn_install_base_item) as a part of your CSDM migration process. Use the following script to migrate the existing records to synchronize the legacy **State** field with the install base life cycle fields.

```
var tableNames = [];//list of tablenames ex:
 ['sn_install_base_item'];
new sn_install_base.IBProductInstanceUtil().
 syncLifeCycleFields(tableNames);
```

Install base hierarchy visualization

Use the **Install Base Hierarchy** tab on the CRM Workspace to view the parent-child hierarchy structure of an install base item.

The install base hierarchy provides a node map of both parent and child items associated with an install base item. The hierarchy node begins with the install base item that is currently open. The node map extends toward both the root install base item and the child install base item up to seven levels of hierarchy.

The first level of the install base hierarchy node map displays the child items associated with the current install base item. Select the levels from the level selector to view the number if install base levels associated with the current install base item.

For example, select Level 1 with the current install base item as the home node, to view all the child items associated with it. Subsequently, at Level 2, set one of the child install base items as a home node to have further insight into its own child items. The number of child items are denoted by a number badge next to the install base node. You can continue to expand the hierarchy structure up to the seventh level or to 250 nodes, whichever comes first.

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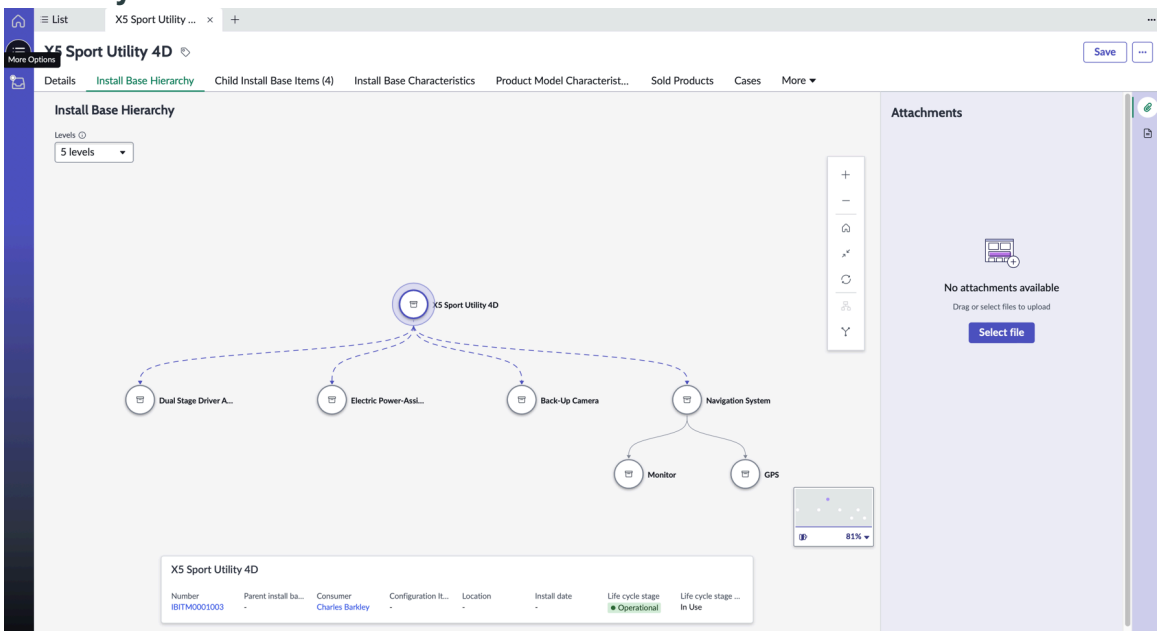
Hierarchy structure for install base items



Note: Badges against child items aren't displayed beyond the seventh level of hierarchy. To view the hierarchy beyond the seven levels, set any one of the install base items in the hierarchy as the home node.

You can use the hierarchy structure of an install base item to perform the following contextual actions on individual nodes.

- Set any node as a home node.
- Create a case from the node.

  To learn about different case types and how to create a case from an install base node, see Customer service case types.

- View details of a node. This opens up the entire record of the install base item.

View the details of any install base that is selected in the hierarchy structure on the record card.

Note: Select the **Number**, **Parent install base item**, **Account**, **Configuration item**, and **Location** fields on the record card to navigate to the install base record.

Installed products

Create an installed product to track information on the instances that a sold product is deployed on at an account or consumer. A sold product can have multiple installed product records depending on the number of instances of the product in use.

Task	Description
Import installed products with guided setup	Import installed products to provide information on the sold products and how they are deployed or installed. Import installed products to create an association between sold products and install base items.
Create installed products	Create an installed product to create an association between sold products and install base items.

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Import installed products with guided setup

Installed products provide information on the sold products and how they are deployed or installed. Import installed products to create an association between sold products and install base items.

Before you begin

Role required: csm_guided_setup_user or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Installed Products**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create installed products

Create an installed product to create an association between sold products and install base items. Installed products provide information on the instances that a sold product is deployed on.

Before you begin

Role required: sn_customerservice_manager or admin

Ensure that the Customer Service Install Base Management plugin (com.snc.install_base) is installed.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Installed Products**.
2. Click **New**.
3. Fill out the fields on the form.

   Installed Product form

Field	Description
Install Base Item	Instance the sold item is deployed on.
Sold Product	Sold product deployed to the customer.

4. Click **Submit**.

Common Service Data Model framework for Install Base Management

The Common Service Data Model (CSDM) framework is a standard set of terms and definitions that you can adopt across all ServiceNow® products on the ServiceNow AI Platform. By using this framework, you can effectively track assets through their lifecycle transitions.

The CSDM is the data framework that you follow when you set up ServiceNow products and applications. You adhere to the CSDM guidelines when you define the configuration items (CIs) and the relationships between CIs in the CMDB. This process helps to ensure that your

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data resides in the appropriate CMDB tables so that you get the maximum value from your ServiceNow AI Platform applications. To learn about CSDM, see Common Service Data Model.

To set up a CSDM environment for Install Base Management, see Activate the CSDM plugin.

Note: It's optional to adopt CSDM. You can either adopt the CSDM framework or continue using the existing model.

You can use a migration script to update the CSDM life-cycle values in the existing install base records. To learn about the migration script, see Synchronize install base life cycle fields with state and status fields.

Configure assets

An asset is a specific product or instance that is supported for a customer.

Role required: admin

Assets can have serial numbers or asset tag numbers and can be allocated to individual accounts or to a contact within an account. Assets can also have associated support contracts.

Note: Customer Service Management leverages the Asset Management application to create and maintain assets. Ensure that the Asset Management plugin (com.snc.asset_management) is activated.

You can either import your existing assets using guided setup or create new assets using the Customer Service Management.

Related topics

Configure install base

Import assets with guided setup

Use Customer Service Management guided setup to import existing assets.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

There are different types of assets and information for each type of asset is stored in a different table. For example, hardware assets are stored in the Hardware [alm_hardware] table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Foundation Data category, click **Get Started** and then click **Import Assets**.
3. Upload data from an external data source into an import set.
4. Create a transform map.
5. Execute the transform map to transfer the data.
6. Verify that the data records are imported into the target table.

Create an asset

Create a record for a specific instance of a product.

Before you begin

Role required: sn_customerservice_manager or admin

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Customer Service Management leverages the Asset Management application to create and maintain assets. Ensure that the Asset Management plugin (com.snc.asset_management) is activated.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Assets**.
2. Click **New**.
3. Select the type of asset to create:
   - Hardware
   - Software License
   - Consumable
   - License
   - Facility
4. Fill in the fields for the selected asset type on the Asset form, as appropriate.
5. Click **Submit**.

Create asset contact relationships

Assign an asset to a customer contact who is responsible for managing that asset.

Account and partner contacts can see all of the assets related to an account. To limit access to an asset, you can create an asset contact relationship and assign the asset to one or more contacts. Then you can enable the associated property to restrict access to the asset information to the assigned contacts.

The system administrator can add a primary contact to an asset by selecting a user in the **Primary Contact** field on the Asset form. This field references the Contacts table and is filtered by the asset's account.

The system administrator can also create relationships with additional contacts from the **Asset Contacts** related list on the Asset form. When you create an asset contact relationship, you can select contacts from:

- The account that the asset belongs to.
- The partner of the account that the asset belongs to.
- Any contacts added to these accounts using contact relationships.

After adding contacts to an asset, enable the related property to limit access. When enabled, the following access is limited from the customer portal:

- When a user clicks **My Assets**, the list shows only those assets for which the user is a contact.
- When a user clicks **Create Case**, the **Asset** field on the Create Case form shows only those assets for which the user is a contact.

Assign a primary contact to an asset

Users with the system administrator role can assign a primary contact to an asset.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Assets**.
2. Click the desired asset.
3. Select a **Primary Contact**.
   This field references the Contacts [customer_contact] table and is filtered by the account selected in the **Account** field.
4. Click **Update**.
   The contact is added to the **Asset Contacts** related list on the asset form.

Assign a contact to an asset

Users with the system administrator role can assign a contact to an asset.

Before you begin

Role required: admin

About this task

Users with the sn_customerservice.customer_admin can also assign a contact to an asset from the Customer Service Portal.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Assets**.
2. Select the desired asset.
3. From the **Asset Contacts** related list, select **New**.
   When you select **New**, a new Asset Contact form is displayed with the **Asset** field filled in.
4. Select a **Contact** from the list of available contacts within the asset's account.
5. Select the **Order** field to specify the sequence in which records are displayed, organized according to business preferences.
6. Select **Submit**.
   The contact is added to the **Asset Contacts** related list.

Enable the asset contact relationship property

Limit access to asset information to the assigned contacts by enabling the associated property.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. Set the *`Restrict Assets based on Contacts assigned to the assets`* property to **true**.
3. Click **Save**.

Create service contracts

Service contracts define the type of support that customers receive.

Before you begin

Role required: sn_customerservice_manager or admin

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About this task

A contract can include an account and contact or a consumer and the specific assets that are covered. A contract can also include multiple service entitlements and SLAs.

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Service Contracts**.
2. Click **New**.
3. Fill in the fields on the Contract form, as appropriate.

Contract form

Field	Definition
Number	The automatically created contract number.
Account	The name of the account associated with this contract.
Consumer	The name of the consumer associated with this contract.
Contract administrator	The individual who is responsible for managing the contract.
Approver	The user who approves or rejects the contract.
Contract number	The number assigned to the contract by the customer.
State	The current state of the contract: ○ Draft ○ Active ○ Expired ○ Canceled
Starts	The date that the contract starts.
Ends	The date that the contract ends.
Name	A name for the contract.

4. Right-click the form header and select **Save**.
   The **Entitlements**, **Assets Covered**, **Terms and Conditions**, **Contracts**, **Cases**, and **Products Covered** related lists are displayed.
5. On the **Products Covered** related list, click **Edit** to associate sold products to the contract.
   The list of sold products displayed is filtered based on the account. Click **Run filter** to see a list of all sold products, but you can only add the sold products that belong to the account selected or to the account hierarchy.
6. Click **Submit**.
   You can also click **Submit For Review** to place the contract in the **Draft** state and send an email to the **Approver** to review the contract.
   Customer service agents can view contract information in Agent Workspace and customers can view contract information on the Customer and Consumer Service Portals.

Associate an install base to a service contract

Associate install base items with a service contract to see the list of all the different service contracts that are associated to an install base item in the Customer Service Management application. By associating an install base, you can set a relationship between an install base and a contract.

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Before you begin
Role required: sn_customerservice_manager and admin

About this task
Associate install bases to service contracts to access all the contracts that are related to the parent install base item.

Procedure
1. Navigate to **All** > **Customer Service**> **Contracts**> **Service Contracts**.
2. Open the contract that you want to associate the install base to.
3. Select **New**.
4. Create an association by selecting a value for the **Install base Item** field.
5. Select **Submit**.

Configure entitlements

An entitlement defines the type of support that a customer receives as well as the supported communication channels.

Before you begin
Role required: sn_customerservice_manager or admin

About this task
You can associate an entitlement with a product, an asset, an account, or a contract. An entitlement check is performed when a case is opened. This check takes into consideration the existing cases for the specific account, product, asset, and service contract. Entitlements can also have associated workflows that drive recommended activities for a case.

Entitlements are counted on a per unit basis. The **Unit** field on the Service Entitlement form defines the unit type, either cases or hours.

The **Total Units** field defines the total number of cases or hours available for this entitlement and the **Remaining Units** field tracks the number of units remaining. These counters are active if the **Per Unit** field is enabled.

The **Remaining Units** field is updated using business rules.

- When using cases as the unit type, the **Update case entitlement on Close** business rule updates this field when a case for a product, asset, company, or contract that has an associated entitlement is closed.
- To use hours as the unit type, customers must create a separate business rule. For example, create a rule that is applied to the amount of time an agent spends on a case. When a case is resolved, deduct the hours spent from the total service hours available in the entitlement.

Keep these guidelines in mind as you create entitlements.

- Product entitlements: when creating an entitlement for a product, select the product from the **Product** field and then select an account or a consumer.
- Asset entitlements: when creating an entitlement for an asset, select a company first and then the only assets that are shown are those belonging to that company.
- Contract entitlements: when creating an entitlement for a contract, select the contract and then the assets that are covered as a contract line item. The resulting contract entitlement is valid for the assets listed within that contract.

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Procedure

- Create entitlements for customer service entities
- Associate entitlements with customer service entities

Create entitlements for CSM entities

Create an entitlement for a Customer Service Management entity such as an account, a consumer, or a product.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Entitlements**.
   You can also create an entitlement from the **Entitlements** related list on the Account and Contract forms.
2. Click **New** at the top of the Entitlements list.
3. Fill in the fields on the Entitlement form.

Service Entitlement form

Field	Definition
Name	The name of the entitlement.
Product	The product model associated with this entitlement.
Account	The name of the account associated with this entitlement.
Consumer	The name of the consumer associated with this entitlement.
Contract	The contract number associated with this entitlement .
Asset	The asset tag number or the serial number of the asset associated with this entitlement.
Active	Check this box to enable the entitlement. Active entitlements are available for selection when creating a new case.
Channel	One or more communication channels associated with this entitlement. ○ Email ○ Web ○ Phone ○ Chat
Install Base Item	The install base item associated with the entitlement. Configure the form layout to add the **Install Base Item** field. **Note:** This field is only available if the Customer Service Install Base Management plugin (com.snc.install_base) is installed.
Sold Product	The sold product associated with the entitlement. Configure the form layout to add the **Sold Product** field.

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Field	Definition
	Note: This field is only available if the Customer Service Install Base Management plugin (com.snc.install_base) is installed.
Business hours	The schedule associated with this entitlement.
Start date	The start date for this entitlement.
End date	The end date for this entitlement.
Total Units	The total number of units designated for this entitlement. This field is active if the **Per unit** check box is enabled.
Remaining Units	The number of available units that are remaining for this entitlement. This field is active if the **Per unit** check box is enabled. This field is updated using business rules. ○ When using cases as the unit type, the **Update case entitlement on Close** business rule updates this field when a case for a product, asset, company, or contract that has an associated entitlement is closed. ○ To use hours as the unit type, customers must create a separate business rule. For example, create a rule that is applied to the amount of time an agent spends on a case. When a case is resolved, deduct the hours spent from the total service hours available in the entitlement.
Unit	The type of unit being measured for this entitlement: **Cases** or **Hours**.
Per unit	Select this check box to enable unit counters. If enabled, the **Total Units** and **Remaining Units** fields are activated.

4. Click **Submit**.

Associate an entitlement with a Customer Service Management entity

Associate an entitlement with a CSM entity such as an account, contract, asset, product, or install base item, to determine the type of support that a customer needs to receive.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Customer Service** > **Contracts** > **Entitlements**.
2. From the Entitlements list, select an entitlement.
3. Select the lookup icon to the right of one of the **Product**, **Account**, **Contract**, **Asset**, or **Install Base Item** fields.
4. From the list, select the entity that you want.

   Note: If you select an entity in more than one of the listed fields, the selections that are available in subsequent fields are filtered by the selections already made.

5. To associate an entitlement with an install base, right-click the Configuring Entitlement Form and navigate to **Form Layout** > **Configure** .
6. From the **Available** box, select **Install Base Item**.

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Your selection is automatically moved into the **Selected** box.

7. Select **Save**.
8. In the Entitlement form that reappears, select the **Install Base Item** field and add the install base item that you want to associate with the entitlement.

Customer service case entitlement calculation

When a customer service agent creates a case, the system uses a configurable method to derive the entitlement based on several fields related to the case record.

These fields include:

- Account
- Consumer
- Product
- Asset
- Contract
- Case Channel

If the Proactive Customer Service Operations plugin (com.snc.proactive_cs_ops) is active, the system also considers these fields:

- Sold Product
- Install Base

Relative weights are assigned to each field. Entitlements are calculated based on the weight and precedence. The entitlement with the highest score is assigned to the case.

Weights assigned to different fields

Field	Weight/Precedence Assigned
Account / Consumer	1
Product	2
Asset / Sold Product / Install Base item	3
Contract	4

The entitlement calculation uses the **global.CSManagementUtils** script and the **getFirstEntitlement** method.

Customer Life Cycle Management Workflows

Manage the life cycle of your sold products by activating the Customer Life Cycle Management Workflows (com.snc.customer_lifecycle_mgmt_workflows) application.

Overview of workflows

The Customer Life Cycle Management Workflows (com.snc.customer_lifecycle_mgmt_workflows) application enables you to update the existing configurations, and to modify, suspend, resume, or disconnect the sold products and their complete hierarchy.

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The workflows are built and composed by using the lead-to-cash transactional operations like Effect, Create Instance, Delta, and Commit Instance. To learn more about the transactional operations of the Lead to Cash Core (com.snc.l2c_core) plugin, see CRM Core.

Plugins for the Customer Life Cycle Management Workflows

The following table lists the required plugins for the Life Cycle Management Workflows (com.snc.customer_lifecycle_mgmt_workflows) plugin.

Required plugins for the Life Cycle Management Workflows plugin

Plugin	Description
Customer Install Base Management (com.snc.install_base)	Enables customers to capture the current state of a customer's install base and establish the relationship to any downstream entities that might impact their functioning. To learn more about install base management, see Configure install base.
Product Catalog Management (com.sn_prd_pm)	Enables companies to define the products and services they market, sell, and deliver to customers. To learn more about product catalogs, see Product Catalog Management.
Lead to Cash Core (com.snc.l2c_core)	Enables customers to compose and build the workflows for various entities. To learn more about the Lead to Cash Core plugin, see CRM Core.

Life Cycle workflows and configurations

Perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** declarative actions on the complete hierarchy of the sold products. These actions will transform and maintain their state and characteristics. You can perform these actions on the sold product entities to update the existing products or services. The declarative actions are available on the sold product related list on the account detail page on Customer Service Workspace.

Note: The declarative actions with the sold product to order flow are available only if the Order Management (com.sn_ind_tmt_orm) plugin is installed.

The Sold Product related list on the Accounts page displays all the sold products regardless of the product offer having a product specification. You can also select a sold product with a product specification associated with the product offering and perform any of the MACD flows. Be sure to upgrade to Xanadu to perform the modify, suspend, resume, and disconnect actions on product offerings that have a specification associated with it.

Note: If Product Inventory records are selected, the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions are deactivated.

Workflows

Multiple sub-flows are based on the modify, suspend, resume, and disconnect actions that help to update the sold products and their configurations. The flows are based on a set of

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entity configurations that are shipped when you activate the Customer Life Cycle Management Workflow plugin.

The following table lists the flows for the declarative actions.

Flow Designers for declarative actions

Flow	Description
Sold product to Suspend order	This flow is responsible for creating a suspend order when the **Suspend** action is triggered on a sold product.
Sold product to Resume order	This flow is responsible for creating a resume order when the **Resume** action is triggered on a sold product.
Sold product to Disconnect order	This flow is responsible for creating a disconnect order when the **Disconnect** action is triggered on a sold product.
Add order to sold product	This flow is responsible for creating a sold product order when order is moved to completed. **Note:** The sn_ind_tmt_orm.enable_prod_invt_for_order_management property is set to **False** by default with the Order Management (com.sn_ind_tmt_orm) plugin. However, if the Order Management for Telecommunications, Media, and Technology (com.sn_om_tmt) plugin is installed, the property value is set to **True**. If the property value is false, a record is created in the sold product (sn_install_base_sold_product) table. If the property value is true, a record is created in the Product inventory (sn_prd_invt_product_inventory) table.
Change order to sold product	After an order is marked completed, this flow triggers and thus entire product hierarchy shows the updated configuration made by the customer, along with the associated pricing adjustments that were processed through the Sold Product to order flow. For more information on pricing management, see Components installed with Pricing Management.

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Flow Designers for declarative actions (continued)

Flow	Description
	Note: The *[sn_ind_tmt_orm.enable_prod_invt_for_ord* is set to **False** by default with the Order Management (com.sn_ind_tmt_orm) plugin. However, if the Order Management for Telecommunications, Media, and Technology (com.sn_om_tmt) plugin is installed, the property value is set to **True**. If the property value is false, a record is created or updated in the sold product (sn_install_base_sold_product) table. If the property value is true, a record is created or updated in the Product inventory (sn_prd_invt_product_inventory) table.
Suspend order to sold product	This flow is responsible for suspending a sold product on completion of an order.
Resume order to sold product	This flow is responsible for resuming a sold product on completion of an order.
Disconnect order to sold product	This flow is responsible for disconnecting a sold product on completion of an order.

Note: If the 'sn_ind_tmt_orm.enable_prod_invt_for_order_management' property is set to true, the last five flows in the displayed table are disabled.

Note: The back and forth flow of the data (from a sold product to an order, an order to a sold product) happens with the help of a set of entity configurations.

Configurations

Configurations are a set of end-to-end flows that enable the data to flow from one entity to the other. The sub-flows that are triggered with each declarative action are based on the configurations that are listed in the following table.

Configurations for declarative actions

Configuration	Configuration ID	Source Entity	Target Entity
Sold product to Order	sn_l2c-cust_flows_sp_to_order	Sold product	Order
Order to Sold Product	sn_l2c_cust_flows_order_to_sp	Order	Sold product

To learn more about the configurations, see Entity configuration and mapping.

Related topics

Modify a sold product and hierarchy

Modify a sold product to create a quote

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Resume a single sold product

Resume multiple sold products

Disconnect a single sold product

Disconnect multiple sold products

Suspend a single sold product

Suspend multiple sold products

Activate Customer Life Cycle Management Self-Service

If you have the admin role, you can install the Customer Life Cycle Management Self Service plugin.

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

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Life Cycle Management Self Service plugin (sn_clm_selfservice) 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 might 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.
   Dependent plugins and applications are listed if they will be installed, are currently installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install the Customer Life Cycle Management Self Service plugin (sn_clm_selfservice).
4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Related topics

View product information from Business Portal

View Product Inventory information on Business Portal

Modify a sold product and hierarchy

Modify a sold product and its complete hierarchy on Customer Service Workspace so that you can update its existing configurations. For example, you may want to modify a sold product's characteristics and the line items (hierarchy) that are associated with it.

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About this task

After an order is created, the fulfillment process for the order begins. After the order is fulfilled and marked **Complete**, the order to sold product flow is triggered. This flow applies the changes to the sold products. The changes are based on the updates that are specified on the order.

Before you begin

Required plugins: Product Configurator UI (app-prd-config-ui)

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **Customer Service Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the product that you want to modify the characteristics and line items for.

   Note: You can do a **Modify** action on either the root or the child sold products only if the sold product is in the **Active** state. The sold product must have a product offering without a specification that is associated with it. If you select two sold products at the same time, you can't do the **Modify** action.

5. Select **Modify**.
6. On the Configurator UI, modify the existing configurations for the sold product.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order to modify the sold product is created. You can select the order number from the confirmation message on the sold products page to open the order and see the order line items. Alternatively, you can find the order in the Customer Orders list.

Modify a sold product to create a quote

Modify a sold product and its complete hierarchy on Customer Service Workspace to generate a quote for any updated characteristics or configurations. For example, a customer may want to find the price to modify a sold product's characteristics and the line items (hierarchy) that are associated with it.

Before you begin

Required plugins: Product Configurator UI (com.sn_prd_config_ui), Quote Management (app-l2c-quote-mgmt), and Customer Lifecycle Management workflows (com.snc.customer_lifecycle_mgmt_workflows).

Role required: Sales Agent (sn_sales_common.sales_agent) or Sales Manager (sn_sales_common.sales_manager)

About this task

Change a sold product or its characteristics. When you modify a sold product's characteristics, a sold product to quote flow is triggered. This flow applies changes to the existing sold product characteristics and presents customers with a quotation based on their selected changes.

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Procedure

1. Navigate to **All** > **Customer Service Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold products related list, select the product that you want to modify the characteristics and line items for.
5. Select **Modify** to update the characteristics of the sold product.

   Note: If you have both the Order Management (com.sn_ind_tmt_orm) and Quote Management (app-l2c-quote-mgmt)) plugins the order agent, order admin, sales agent, and sales manager can perform the **Modify** action that results in an order. To specifically create a quote, customers must configure the decision table to modify existing sold product according to their business needs. Users performing the modify flow must have both the sales agenda and the order agent roles. To learn more about the decision table, see Modify decision table rules in Workflow Studio.

6. On the Configurator UI, modify the existing configurations for the sold product.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   A quote to modify the sold product and its hierarchy is created. You can select the quote number from the confirmation message on the sold products page to open the quote and see the quote line items.

   In the Sold product to Quote flow, the data from **Account**, **Contact**, **Name**,**Product Offering**, **Quantity**, **Sys_id**, **Characteristic**, **Characteristic Option**, and **Characteristic Value** fields are transferred from the Sold Product to Quote Line Item records.

Resuming sold products

Resume sold products to create a resume order on the CRM Workspace.

Resume single or multiple root sold products and create combined orders for suspension and resumption of products and servies at the same time, to improve agent efficiency.

Resume sold products

Task	Description
Resume a single sold product	Resume a single sold product
Resume multiple sold products	Resume multiple sold products

Resume a single sold product

Create an order to resume a sold product and its hierarchy on the CRM Workspace. By resuming a sold product, you can restart a product or service.

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow enables you to resume a sold product.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

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Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold product that you want to resume.

   Note: You can do a **Resume** action on the root sold product only if it is in the **Active** state. The sold product must not have a specification that is associated with it. The **Resume** option isn't visible if you select a child sold product.

5. Select **Resume**.

   The **Resume** action is enabled on sold products that are in **Inactive** or **Suspended** states only.

6. In the Resume sold product window, in the **Start date and time** field, enter when you want to resume the sold product.
7. Select **Resume**.

Result

An order for resuming the sold product is created.

Resume multiple sold products

Create an order to resume multiple sold products and their hierarchy on the CRM Workspace.

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow creates sold products on the sold product table (sn_install_base_sold_product).

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold products that you want to resume.

   Note: You can do a **Resume** action only on the root sold product with a product offering and if it is in the **Inactive** or **Suspended** state. The **Resume** option is disabled if you select a child-sold product.

5. Select **Resume**.
6. In the Resume sold products window, in the **Start date and time** field, enter when you want to resume the sold products.
7. Add a reason for a resumption in the **Reason for resumption** field.
8. Select **Resume**.

Result

An order for resuming the sold products is created, while order line items are created in an asynchronized manner.

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Supending sold products

Suspend sold products to create a suspend order or quote on the CRM Workspace.

Supend single or multiple root sold products and create combined orders for suspension and resumption of products and services at the same time, to improve agent efficiency.

Suspend sold products

Task	Description
Suspend a single sold product	Suspend a single sold product
Suspend multiple sold products	Suspend multiple sold products

Suspend a single sold product

Create an order to suspend a sold product and its hierarchy on the CRM Workspace. By suspending a sold product, you can reduce the number of canceled products or services and take the time to fix that product or service.

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow enables you to suspend a sold product.

Note: You can also indefinitely suspend a sold product without creating a resume order.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold product that you want to suspend.

   Note: You can do a **Suspend** action on the root sold product only if it is in the **Active** state. The sold product must not have a specification that is associated with it. The **Suspend** option isn't visible if you select a child sold product.

5. Select **Suspend**.
6. In the Suspend sold product window, in the **Start date and time** field, enter the start date and time that you want to start the suspension.

   Note: If you fill in only the **Start date and time** field, a suspend order line item is created. A resume order line item is created within the same order header if the **End date and time** field is also filled in.

7. Add a reason for a suspension in the **Reason for suspension** field.
   For example, a disturbance due to a renovation can be a reason for suspension.
8. Select **Suspend**.

Result

An order with the suspend action is created for the suspend order line items. If you specify an end date and time, a resume order line item is created as a part of the same order. When you

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update the suspend action line item to **Complete**, the sold product state automatically updates to **Suspended**. When you move the state of the resume action line item to **Completed**, the sold product state updates to the **Active** state. The **Resume** action is enabled only if you set the state of the sold product as **Inactive**.

Suspend multiple sold products

Create an order to suspend multiple sold product and their hierarchy on the CRM Workspace. By suspending a sold product, you can reduce the number of canceled products or services and take the time to fix that product or service.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow creates sold products on the sold product table (sn_install_base_sold_product).

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. In the Sold Products related list, select the sold products that you want to suspend.

   Note: You can do a **Suspend** action only on root sold products with a product offering and if it is in the **Active** state. The **Suspend** option is disabled if you select a child sold product.

5. Select **Suspend**.
6. In the Suspend sold products window, in the **Start date and time** field, enter the start date and time that you want to start the suspension.

   You can see the selected sold products in the accordian.

   Note: If you fill in only the **Start date and time** field, a suspend order line item is created. If you fill in the **End date and time** field, a resume order line item is also created within the same order header.

7. Add a reason for a suspension in the **Reason for suspension** field.
   For example, a disturbance due to a renovation can be a reason for suspension.
8. Select **Suspend**.

Result

An order with the suspend action is created. Suspend order line items are created in an asynchronized process. If you specify an end date and time, a resume order line item is also created as a part of the same order.

When you update the suspend order line item to **Complete**, the sold product state automatically updates to **Suspended**.

When you update the state of the resume order line item to **Completed**, the sold product state updates to the **Active** state.

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Disconnecting sold products

Disconnect sold products to create a disconnect order on the CRM Workspace.

Disconnect single or multiple root sold products at the same time, to improve agent efficiency.

Disconnect sold products

Task	Description
Disconnect a single sold product	Disconnect a single sold product
Disconnect multiple sold products	Disconnect multiple sold products

Disconnect a single sold product

Disconnect a sold product in the CRM Workspace so that you can permanently disconnect a product and its services.

About this task

After an order is created on the order form and is marked **Complete**, a flow is triggered. This flow enables you to disconnect a sold product and its services after fulfillment.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. From the Sold Products related list, select the sold product that you want to disconnect.

   Note: You can do the **Disconnect** action only on one root sold product whose state is **Active** and has a product offering without a specification that is associated with it. The option isn't visible if you select a child sold product.

5. Select **Disconnect**.
6. In the Disconnect sold product pop-up window, enter when you want the disconnection to start in the **Start date and time** field.
   Enter the reason why you want to disconnect the product in the **Reason for disconnection** field.
7. Select **Submit**.

Result

An order for a disconnection is created. After the order is fulfilled, the sold product is moved to the **Inactive** state.

Disconnect multiple sold products

Create an order to disconnect multiple sold products and their hierarchy on the CRM Workspace.

Before you begin

Role required: sn_ind_tmt_orm.order_admin or sn_ind_tmt_orm.order_agent

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About this task

After an order is created and marked **Complete**, the order to sold product flow is triggered after fulfillment. This flow creates sold products on the sold product table (sn_install_base_sold_product).

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold products belong to.
4. In the Sold Products related list, select the sold products that you want to disconnect.

   Note: You can do a **Disconnect** action only on the root sold product with a product offering only if it is in the **Active** state. The **Disconnect** option is disabled if you select a child-sold product.

5. Select **Disconnect**.
6. In the disconnect sold products window, in the **Start date and time** field, enter when you want to disconnect the sold products.
7. Add a reason for a suspension in the **Reason for disconnection** field.
8. Select **Disconnect**.

Result

An order for disconnecting the sold products is created, while order line items are created in an aysnchronized manner.

Extension points for workflows

Override existing scripts or call custom scripts for the workflows by using extension points on the ServiceNow AI Platform®.

You can access the available extension points for the customer life cycle management workflows in the ServiceNow AI Platform®. Start by entering **sys_extension_point.list** in the application navigator and pressing **Enter**. Then, you can select the extension point that you want to view the record details of. If you want to override an existing script, you can select **Create implementation**.

You can create extension points so that you can create a workflow for a sold product extension that is not already configured. You can also override extension points to create configurations. To learn more about the existing extensions and configurations of the Customer Life Cycle Management Workflows, see Customer Life Cycle Management Workflows.

You can create several implementations for each extension point and provide an order number for each implementation. The implementation that has the lowest order number is the one that is executed.

The following table lists the extension points of the Customer Life Cycle Management Workflows.

Extension points for the Customer Life Cycle Management Worklows application

Extension points	Description
CustomerWorkflowsEP	Overrides the existing flows and configurations.

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Extension points for the Customer Life Cycle Management Worklows application (continued)

Extension points	Description
sn_l2c_cust.flows.CustomerWorkflowEP	This extension can be used for any one of these two reasons: • If you want to execute custom flows that are extensions of the current sold product (sn_install_base_sold_product) table. To learn more about existing flows, see Customer Life Cycle Management Workflows. • If you want to execute custom Lead to Cash Core configurations. To learn more about existing Lead to Cash configurations, see Entity configuration and mapping.
GetSoldProductClassEP sn_l2c_cust_flows.GetSoldProductClassEP	Returns the correct sold product and product inventory class. The extension can be used to create custom flows in the **Add** and **Modify** flows.
CustomerWorkflowCompleteEP sn_l2c_cust_flows.CustomerWorkflowCompleteEP	Overrides existing methods to perform any custom post-processing actions after an order to sold product flow is complete.

Product inventory configurations

You can select one or more product inventory records to update their configurations and perform the **Modify**,**Suspend**, **Resume**, and **Disconnect** operations.

Create orders or quotes from product inventory records on the CRM Workspace.

Configurations for product inventory records

Action	Description
Modify product inventory records	Perform the **Modify** operation on a single product inventory record that results in the creation of an order.
Modify product inventory records to create a quote	Perform the **Modify** operation on a single product inventory record that results in the creation of a quote.
Resume product inventory records	Perform the **Resume** operation on single or multiple product inventory records that result in the creation of resume orders.
Suspend product inventory records	Perform the **Suspend** operation on single or multiple product inventory records that result in the creation of suspend orders.
Disconnect product inventory records	Perform the **Disconnect** operation on single or multiple product inventory records that result in the creation of disconnect orders.

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Modify product inventory records

Perform the **Modify** operation on a single product inventory record that results in the creation of an order on the CRM Workspace to update its existing configurations. For example, you may want to add or delete an optional product inventory or update its configurations.

Before you begin

Role required: Sales Agent (sn_sales_common.sales_agent) or Sales Manager (sn_sales_common.sales_manager)

About this task

When a **Modify** action is performed and an order is created, the fulfillment process for the order begins. After the fulfillment flow is complete, the order is marked as **Complete** and the product inventory record is updated.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the Product Inventories related list.

   Note: The Product Inventories related list will be available out of the box starting from the Yokohama release. Customers using the Washington or Xanadu versions must add the related list manually.

   You can retain either the sold product or the product inventories related list. If you want to retain both the lists, filter out the product inventory records from the sold product related list and perform the **Modify** flow from the product inventory record.

5. Select a product inventory record in **Active** state and select **Modify**.

   Note: The **Modify** flow can be triggered only on a root product inventory record.

6. On the Configurator UI, modify the existing configurations for the product inventory record. To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.
   An order to modify the product inventory is created. You can select the order number from the confirmation message on the account page to open the order and see the order line items. Alternatively, you can find the order in the Customer Orders list.

Modify product inventory records to create a quote

Perform the **Modify** operation on a single product inventory record that results in the creation of a quote on the CRM Workspace. For example, you might want to add or delete an optional product inventory or update its configurations.

Before you begin

Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task

The **Modify** flow generates a quote. After the quote is marked as **Complete**, an order is created. On fulfillment of the order, the product inventory record is updated.

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Required plugins: Product Configurator UI (com.sn_prd_config_ui), Quote Management (app-l2c-quote-mgmt), and Customer Lifecycle Management workflows (com.snc.customer_lifecycle_mgmt_workflows)

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the **Product Inventories** related list.
5. Select a single product inventory record in **Active** state and select **Modify**.

   Note: The **Modify** flow can be triggered only on a root product inventory record.

   If you have both the Order Management (com.sn_ind_tmt_orm) and Quote Management (app-l2c-quote-mgmt)) plugins the order agent, order admin, sales agent, and sales manager can perform the Modify action that results in an order. Users performing the modify flow must have both the sales agent and the order agent roles. To specifically create a quote, customers must configure the decision table to modify existing sold product according to their business needs. Update the configurations on the Customer Life Cycle Workflows policy decision table. To learn more about the decision table, see Modify decision table rules in Workflow Studio.

6. On the Configurator UI, modify the existing configurations for the product inventory.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
   A quote to modify the product inventory is created. You can select the quote number from the confirmation message on the account page to open the quote and see the quote line items. Alternatively, you can find the quote from **All Menu** > **Quote** in the Quote list.

Suspend product inventory records

Perform the **Suspend** operation on single or multiple product inventory records that result in the creation of orders or quotes on the CRM Workspace. By suspending a product inventory, you can pause your services for a period of time.

Before you begin

Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task

After performing the **Suspend** action, a suspend order is created and the fulfillment process for the order begins. This fulfillment flow marks the order as **Complete** and updates the product inventory records.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the **Product Inventories** related list and select one or more root product inventory records.

   Note: You can do a **Suspend** action on a single or multiple root sold products only if it is in the **Active** state and is disabled for any other state.

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5. Select **Suspend**.
6. In the Suspend window, in the **Start date and time** field, enter the start date and time that you want to start the suspension.

   Note: If you fill in only the **Start date and time** field, suspend order line items are created. Resume order line items are created within the same order header if the **End date and time** field is also filled in. You can also indefinitely suspend a product inventory without creating a resume order by not entering an end date.

7. If you know when you want to end the suspension, enter the **End date and time** field.
8. Add a reason for a suspension in the **Reason for suspension** field.
   For example, a disturbance due to a renovation can be a reason for suspension.
9. Select **Suspend**.

Result

An order to suspend the product inventory record is created.

Resume product inventory records

Perform the **Resume** operation on single or multiple product inventory records that result in the creation of orders or quotes on the CRM Workspace. By resuming a product inventory, you can restart a product or service.

Before you begin

Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task

After performing the **Resume** action, a resume order is created and the fulfillment process for the order begins. This fulfillment flow marks the order as **Complete** and updates the product inventory records.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace.**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the sold product belongs to.
4. Navigate to the **Product Inventories** related list and select one or more root product inventory records.

   Note: You can do a **Resume** action on the root product inventory only if it is in the **Suspended** state.

   The **Resume** option is enabled only if the root product inventory with **Suspended** state is selected and is disabled for any other state.

   The option is disabled if you select a child sold product.

5. Select **Resume**.
6. In the Resume window, in the **Start date and time** field, enter when you want to resume the product inventory.
7. Select **Resume**.

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Result
An order for resuming the product inventory records are created.

Disconnect product inventory records

Perform the **Disconnect** operation on single or multiple product inventory records that result in the creation of orders or quotes on the CRM Workspace so that you can permanently disconnect a product and its services.

Before you begin
Role required: Order admin (sn_ind_tmt_orm.order_admin) or Order agent (sn_ind_tmt_orm.order_agent)

About this task
After performing the **Disconnect** action, a disconnect order is created and the fulfillment process for the order begins. This fulfillment flow marks the order as **Complete** and updates the product inventory records.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the product inventory belongs to.
4. Navigate to the **Product Inventories** related list and select one or more root product inventory records.

   Note: You can do the **Disconnect** action only on one root sold product whose state is **Active** or **Suspended**, and the option is enabled only if the root product inventory with **Active** or **Suspended** states are selected and is disabled for any other state.

5. Select **Disconnect**.
6. In the Disconnect window, enter when you want the disconnection to start in the **Start date and time** field.
7. Add a reason for a disconnection in the **Reason for disconnection** field.
8. Select **Disconnect**.

Result
An order to disconnect the product inventory record is created.

Configure Customer Contracts and Entitlements

Use the Customer Contracts and Entitlements application to configure and display customer contracts and entitlements.

Activate Customer Contracts and Entitlements

As an admin, you can activate the following plugins to enable users to create and manage Customer Contracts and Entitlements. For more information, see Activate a plugin.

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Customer Contracts and Entitlements plugins

Plugin	Description	Dependency
Customer Contracts and Entitlements [com.sn_pss_core]	Provides foundational objects to manage Customer Contracts and Entitlements and APIs for integration.	• Customer Service Install Base Management [com.snc.install_base] • Product Catalog Management Core [com.sn.prd_pm]
Entitlements Verification [com.sn_ent_verify]	Provides APIs to verify entitlement.	Customer Contracts and Entitlements [com.sn_pss_core]
Contracts and Entitlement Workflows [com.sn_contract_ent_wf]	Provides workflows to manage changes on Customer Contracts and Entitlements.	• Customer Contracts and Entitlements Foundation [com.sn_pss_core] • Lead to Cash Primitives [com.sn_l2c_core] • Customer Life Cycle Management Workflows [com.sn_l2c_cust_flows]

With the activation of Customer Contracts and Entitlements, the existing contracts are available for viewing only.

For more information on the installed roles and tables, see Components installed with Customer Contracts and Entitlements.

Request apps from the ServiceNow Store

Visit the ServiceNow Store website 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.

Components installed with Customer Contracts and Entitlements

Several types of components are installed with the Customer Contracts and Entitlements application, including tables and roles.

The following roles are added with the activation of the Customer Contracts and Entitlements plugins.

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Roles installed

Role	Description	Contains role	Targeted per
sn_pss_core.service_contract_viewer Service contract viewer	Performs read operation on: • customer contracts • Contract lines • Entitlements • Characteristics • Entitlement usages	• sn_prd_pm.characteristics_viewer Characteristic viewer • sn_prd_pm.product_catalog_viewer Product catalog viewer	• sn_custor Consume • sn_custor Customer • sn_custor Customer
sn_pss_core.service_contract_manager Service contract manager	Performs create/read/update operations on: • Customer contracts • Contract lines • Entitlements • Characteristics • Entitlement usages	sn_pss_core.service_contract_viewer Service contract viewer	sn_custome CSM Manag
sn_pss_core.pss_integrator Integration user	Performs create/read operations by using rest endpoints on customer contracts and entitlements.	sn_customerservice.manager CSM Manager	sn_pss_core Integration U

The following tables are added with the activation of the Customer Contracts and Entitlements application.

Tables installed

Table name	Description
Characteristics [sn_pss_core_entitlement_characteristic]	Stores the characteristic values for entitlements or customer contract lines.
Entitlement Usage [sn_pss_core_contract_entitlement_usage]	Stores the values used by end customers for entitlement characteristics.
Service Contract [sn_pss_core_service_contract]	Stores runtime contracts.

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Tables installed (continued)

Table name	Description
Service Contract Line [sn_pss_core_service_contract_line]	Stores the runtime contract lines like a service plan.

You can assign roles to users and groups using the ServiceNow AI Platform user administration features. For more information, see:

- Assign a role to a user
- Assign a role to a group

The default view on customer contracts and entitlements in Customer Service Management workspace is Service Contract Workspace view. It can be changed by an administrator.

Configuring Contracts and Entitlement Workflows

Configure the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf) to generate and modify contracts using order management.

As an admin, you can activate the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf). For more information, see Activate a plugin.

The following plugins are prerequisites for activating the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf):

Required plugins

Plugin	Description
Product Configuration UI (com.sn_prd_config_ui)	Graphical interface that enables to configure complex products or services according to specific needs and requirements.
Order Management (com.sn_ind_tmt_orm)	Captures, enhances, and oversees the complete life cycle of the product and customer orders. With this plugin, you can efficiently handle the order orchestration, data enrichment, and composition to ensure an accurate and timely fulfillment.

After installing the Contracts and Entitlement Workflows plugin (com.sn_contract_ent_wf), the following plugins are automatically installed:

Dependent plugins

Plugin	Description
Customer Contracts and Entitlements (com.sn_pss_core)	Provides foundational objects to manage customer contracts and entitlements.
Lead to Cash Core (com.snc.l2c_core)	Enables customers to compose Sales CRM flows.
Customer Life Cycle Management Workflows (com.snc.l2c_cust_flows)	Provides workflows to manage the life cycles of sold products and install base items.

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Creating contracts and entitlements using workflows

After a product offer is selected by the customer and the product is sold to the customer, this workflow creates contracts and entitlements based on the services associated with that sold product and the extra services that the customer has purchased.

There are the product offering scenarios and their configurations.

Offering types and workflows

Offering types	Description
Offers for entitlements	The workflow creates entitlement records for such offerings. These entitlements can be associated with existing sold products, install base items, product inventory records, or the customer.
Offers for services (contract lines)	The workflow enables automatic creation of a customer contract, customer contract lines, and the entitlements for those contract lines.
Implicit offerings	Implicit entitlements and customer contract lines are not shown on order lines. These offers can be marked as implicit when they do not need to be configured while capturing the order and are available as part of a package. These entitlements and customer contract lines are automatically created as a part of this workflow.

Creating a contract from an order

For every order with multiple product offerings, a single contract with multiple contract lines is created. As part of the order processing, a sold product is generated for every order line.

Creating contracts from product inventory records

If the system property sn_ind_tmt_orm.enable_prod_invt_for_order_management is set to true, order fulfillment workflows create product inventories based on customer orders, product offerings and specifications. On creation of a product inventory, contract lines and entitlements will be created. When a product inventory undergoes a state change, the associated contract lines and entitlements are synced. For more information, see Product inventory configurations. Product inventory records trigger updates to contracts and entitlements under the following conditions:

- Process Telecom Order Line flow: The ADD flow creates contract and entitlement records from the product inventory. The MODIFY flow updates the states of the contract line items and entitlements.
- Post Process Telecom Top Domain Order flow: The MODIFY flow updates the states, fields, and characteristics for contract line items and entitlements.
- Product Inventory Operations record: Depending on the scheduled date and time, the DISCONNECT, RESUME, and SUSPEND flows cancels, activates, or suspends the contract line items and entitlements.

Configuring Customer Life Cycle Workflows Policy decision table

Customer Life Cycle Workflows Policy decision table decides the target entity while renewing and modifying customer contracts, customer contract lines, and entitlements. Based on this decision table, you can create a quote, an order, an opportunity, or an opportunity and a quote

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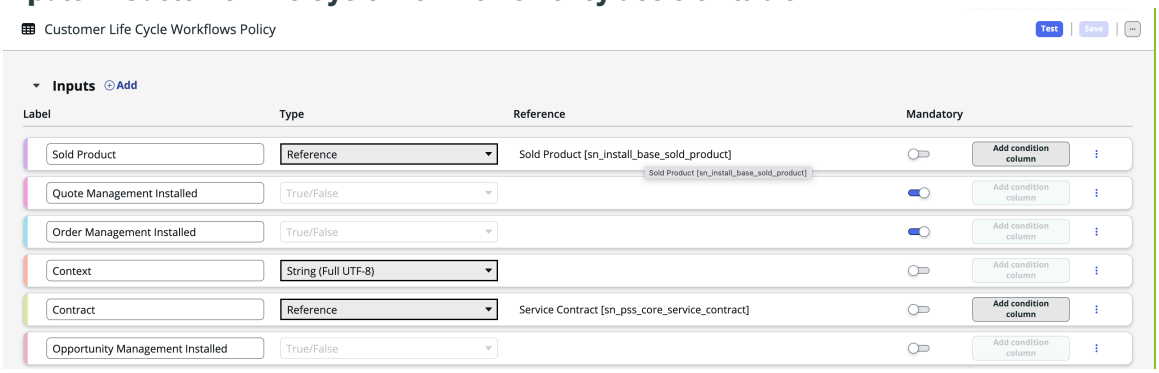
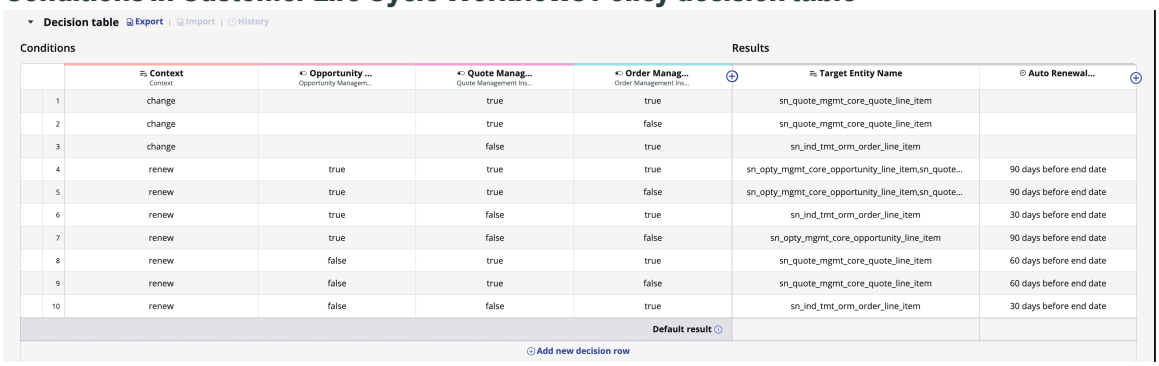
together while renewing or modifying a customer contract. For a target entity, you can also select when you want to initiate the renewal of the customer contract.

Inputs in Customer Life Cycle Workflows Policy decision table



Conditions in Customer Life Cycle Workflows Policy decision table



Decision table Export | Import | History

	Conditions				Results	
	Context	Opportunity ...	Quote Manag...	Order Manag...	Target Entity Name	Auto Renewal...
1	change		true	true	sn_quote_mgmt_core_quote_line_item	
2	change		true	false	sn_quote_mgmt_core_quote_line_item	
3	change		false	true	sn_ind_tmt_orm_order_line_item	
4	renew	true	true	true	sn_opty_mgmt_core_opportunity_line_item,sn_quote...	90 days before end date
5	renew	true	true	false	sn_opty_mgmt_core_opportunity_line_item,sn_quote...	90 days before end date
6	renew	true	false	true	sn_ind_tmt_orm_order_line_item	30 days before end date
7	renew	true	false	false	sn_opty_mgmt_core_opportunity_line_item	90 days before end date
8	renew	false	true	true	sn_quote_mgmt_core_quote_line_item	60 days before end date
9	renew	false	true	false	sn_quote_mgmt_core_quote_line_item	60 days before end date
10	renew	false	false	true	sn_ind_tmt_orm_order_line_item	30 days before end date
				Default result		

Add new decision row

You can configure rules based on the six available input parameters to a required target entity while renewing and modifying contracts. Select the following values in the Target Entity Name column to create the corresponding target entities.

https://player.vimeo.com/video/1143586505?h=0a306a1773&badge=0&autopause=0&player_id=0&app_id=58479

Values of target entities

Value	Target Entity
`sn_ind_tmt_orm_order_line_item`	Order
`sn_quote_mgmt_core_quote_line_item`	Quote
`sn_opty_mgmt_core_opportunity_line_item`	Opportunity **Note:** You cannot create opportunities for modifying process.
`sn_quote_mgmt_core_quote_line_item,sn_opty_mgmt_core_opportunity_line_item`	Opportunity and quote together **Note:** You cannot create opportunities and quotes for modifying process.

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Note: To create an opportunity or opportunity and quote together during renewal, the admin needs to set up the following records:

- Sales Cycle Type: In the Code field, enter **RENEW** and set the Active option to **True**. For more info, see Create a sales cycle for an opportunity.
- Opportunity Stage: In the Name field, enter **Develop** and set the Active option to **True**. For more info, see Create opportunity stages.

If the user selects an opportunity and a quote as target entities, a renewal opportunity and a quote is created. The opportunity and the quote are associated to each other.

For any target entity, select one of the following options in the Auto Renewal Initiation column to indicate when you want to automatically renew the contract: 90, 60, 30 days before contract end date or on the contract creation date. For target entity as opportunity and quote together, you can also select the following options to create the renewed opportunity and quote on separate dates:

- With contract, 12 months before end date respectively: Opportunity is auto renewed on the contract creation date and the quote is renewed 12 months before the contract expiry date.
- 90, 90 days before end date respectively: Opportunity and quote both are renewed 90 days before the contract expiry date.

Setting up the Customer Contracts and Entitlements application

Configure the features and components of Customer Contracts and Entitlements to enable a seamless, end-to-end service experience including after sales services for your customers.

As a user with the admin role, you can set up the Customer Contracts and Entitlements application to enable users to create entitlements and customer contracts for users.

Task	Description
Create a characteristic	Create a characteristic to add to an entitlement. A characteristic refers to the specific attributes or properties that define the entitlement.
Create a user	Add a user to your instance to enable them to log in and use designated application features. After adding the user, you make them approver to review customer contracts.
Assign a role to a user	Assign roles to users. Use this feature to grant the sn_customerservice_manager (CSM manager) role to a newly added user and authorize them to make an informed judgment to review a customer contract.
Create customer accounts **Note:** On the Accounts form, to view the customer contracts, remove the contract-related lists and configure the customer contracts related list.	Create an account and associate it to a customer contract.
Create a consumer record	Create a consumer record in Customer Service Management. A consumer can be associated with a customer contract in the Customer Contracts and Entitlements application.

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Task	Description
Create a sold product	Create a record for a product that is sold to an account or a consumer. A sold product can be associated with multiple contracts.
Create an install base item	Create a record for an install base item that is sold to an account or a consumer. An install base item can be associated with multiple contracts.

Create a characteristic

Create a characteristic that can be associated with an entitlement or customer contract line.

Before you begin

Role required: sn_customerservice_manager

About this task

A characteristic is used for defining the service coverage that is provided to customers. These characteristics might include the scope of the service, the time period, and any limitations or exclusions such as geographical location and other attributes.

Procedure

1. Navigate to **All** > **Product Catalog Management** > **Characteristics** > **Characteristics**.
2. Select **New**.
3. On the form, fill in the fields.

Characteristic form

Field	Description
Name	The name of the characteristic for the entitlement.
Input type	The type of input for the coverage value related to this characteristic. For example, Choice and CheckBox.
Description	The short overview of the entitlement characteristic.

4. Select **Submit**.

Data models

Understand how Customer Service Management (CSM) structures customer, account, and service data as reusable models. These models define your customers, their assets, and service organizations. They form the common data foundation for CSM case management and connected applications.

Overview of CSM data model

CSM doesn't scatter customer data across separate stores. It builds on one shared set of data models. A company, a person, a product, or a service organization is defined once and used across every CSM workflow.

The Customer Data Foundation models describe the customer side of the picture. They cover accounts and contacts for business-to-business (B2B) service, consumers and households for business-to-consumer (B2C) service, and the combined business-to-business-to-consumer (B2B2C) structures. They also cover customer addresses and the relationships and access rules that connect them. Whereas the models describe the service side. They cover service

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organizations, business locations, and service offerings, used when a case is serviced through or on behalf of another organization.

Together these models give every case a consistent answer to three questions: who the customer is, what they own, and which organization services them. Because the data is shared rather than duplicated, a record created once is available wherever CSM needs it. The same foundation is reused by applications such as Field Service Management and Sales Customer Relationship Management, without a separate copy or sync.

Related topics

Configure Service Model Foundation

Configure customer data models for B2B2C

Customer Service Management and the CSDM guidelines

Configure Service Model Foundation

Configure the Service Model Foundation feature to create structured data models for your customer service operations. You can use this framework to create structured and flexible data models that represent your business needs.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Service Model Foundation provides the core framework and guidance for building and modeling the entities that are involved in the customer service value chain. This framework introduces new entities, such as service organizations, internal and external business locations, and households. It also introduces roles and relationships that provide both flexibility and control in granting access to customer cases and information.

With the Service Model Foundation plugins, you can support:

- Internal business locations and staff members
- External business locations and staff members
- Households and household members

For more information about this feature, see Service Model Foundation overview.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** on the Getting Started page.
3. In the Service Model Foundation category, view the list of tasks to configure the feature.

Customer central configuration tasks

Task	Description
Activating plugins for Service Model Foundation	Activate the plugins:

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Task	Description
	○ Business Location (com.snc.business_location) ○ Customer Household Data Model (com.snc.household)
Activate query rules	Activate the query rules by setting the system property [sn_cs_queryrules.use_query_rules] value to **true**.
Configure forms and lists	Configure forms to add the fields and related lists that support the business location and household models.
Assign responsibilities	Assign responsibilities to the service organization (SO) member using the responsibility data model.
Assign roles	Roles control access to features, capabilities, and data. The Service Model Foundation plugins add roles that you can assign to internal and external users in your organization.
Create relationships	Use relationships to provide internal and external users with additional access to customer data. Relationships are based on responsibility definitions. When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another. The Service Model Foundation plugins provide both relationships and responsibility definitions that you can use to create relationships between users.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Service Model Foundation overview

The Customer Service Management (CSM) application includes the Service Model Foundation framework, formerly named Industry Data Model, which enables you to model the business organization structure, customer organizations, and relations between them.

> **Important:** Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

The Service Model Foundation framework expands the Customer Service Management (CSM) data model, including the Install base model. It's a core framework that enables the configuration of all the above entities and is highly flexible to enable support for various industries. It covers all organization entities, like company, service organization, internal/external business locations, departments, divisions, business units, and outsourced service provider entities. It's designed to

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support various industries such as banking, insurance, government, healthcare, manufacturing, retail, and the public sector.

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Service Model Foundation capabilities

As a robust data model, the Service Model Foundation enables organizations to track and act on critical information. Here are a few ways that Service Model Foundation powers end-user experiences.

- Omnichannel support: Members of a business location can request support for their service organization using the same channels as end customers, like virtual agent, phone, text, or live chat. The associated business location is automatically identified, helping agents recognize that the request concerns a location rather than an individual.
- Business Location Service Portal (BLSP): The BLSP lets team members submit and track requests on behalf of their business locations. It serves as a central hub to access knowledge articles, contact details, and install base information. The portal also offers an intuitive case view where teams can comment on or close cases without switching to the workspace.
- Business Location 360: Agents can view the complete business location context through a dedicated 360 view in the workspace. It displays current and past requests, member details, and a visual organization hierarchy, all in one place.
- Shared case visibility: Cases created on behalf of a business location are visible to all its members and managers. This shared visibility reduces duplicate requests and enables faster follow-ups, as any authorized member can track or respond to updates.
- Role-based access according to location: Service Model Foundation manages access through a mix of user roles and location-based responsibilities. Administrators can assign users to multiple locations with different access levels, confirming permissions match each user's specific responsibilities.

Benefits

Use the Service Model Foundation framework to model the service organization structure that is involved in supporting your end customers. With this framework, you can:

- Create a service organization structure that includes both internal and external business locations.
- Assign customer service agents to business locations and provide access to the cases and customer information in their business location hierarchy.
- Establish relationships between agents and specific customers that enable agents to manage cases and information for those customers.
- Establish relationships between the consumers, including consumers who are members of the same household.

Related topics

Configure Service Model Foundation

Service Model Foundation business locations

Integration with Sales Customer Relationship Management

Service Model Foundation data model

The Service Model Foundation data model defines the underlying structure that supports data consistency and relationships across Service Model Foundation. The data model explains its

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purpose, including how entities such as services, locations, and accounts are organized and connected through the entity-relationship Diagram (ERD) and reference architecture. It provides a unified view of data design, confirming scalability, integrity, and seamless integration across Service Model Foundation components.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Service Model Foundation provides a framework that your customers can use to create structured yet flexible data models that represent their business structure. Central support represents the supporting entity within the main organization. Service organizations represent additional entities providing customer support.

There are three types of service organizations:

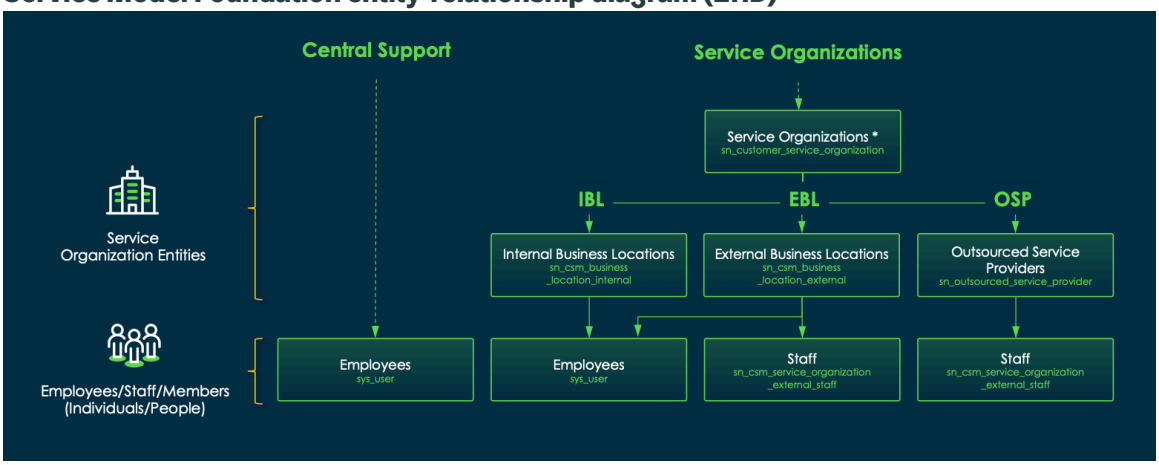
- Internal Business Locations (IBL)
- External Business Locations (EBL)
- Outsourced Service Providers (OSP)

Note: These business locations can also be logical entities and not necessarily physical locations.

Entity relationship model

The following entity-relationship diagram (ERD) shows the tables and their relationships that comprise the Service Model Foundation data model.

Service Model Foundation entity-relationship diagram (ERD)



This ERD illustrates the structural relationships among service organizations, business locations, and staff or employees within the Service Model Foundation. A service organization manages multiple internal (IBL), external (EBL), and outsourced (OSP) locations, each associated with its own workforce, that is employees or external staff, who perform service activities.

The model differentiates internal versus external service delivery contexts while maintaining a unified link through the sys_user and service organization staff tables. It provides the foundation for access control, visibility, and data consistency across all Service Model Foundation entities.

Reference architecture and data flow model

The following reference architecture diagram illustrates the technical framework and data flow within the Service Model Foundation (SMF) system.

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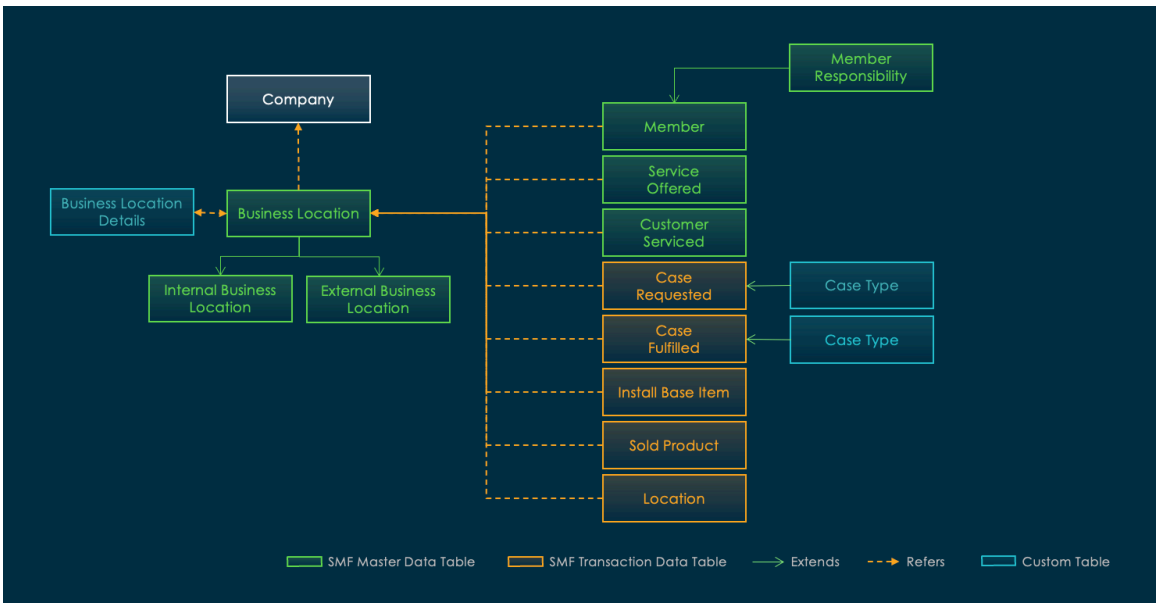
Service Model Foundation reference architecture



This reference architecture highlights how various system components, tables, and services interact to deliver and manage service operations. It shows the flow of data between primary data tables, transaction tables, and custom tables, emphasizing the integration points between internal and external business locations, service offerings, and case management processes.

The reference architecture ensures a clear understanding of how information is processed, routed, and stored across the Service Model Foundation system.

Entities included with Service Model Foundation

The Service Model Foundation feature includes the following entities.

Service Model Foundation entities

Entity	Definition	Examples
Service organizations	The internal and external entities that are involved in providing a service to customers. A service organization provides the base framework that supports the customer service value chain. This framework includes internal and external service organizations. You can extend the service organization to create entities as needed.	• Financial service organizations with multiple branches • Automobile manufacturers with multiple dealerships • Government agencies with multiple office locations

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Service Model Foundation entities (continued)

Entity	Definition	Examples
Internal business locations	The internal entities that belong to a service organization and are involved in providing goods and services.	• Stores • Branches • Centers
External business locations	The external entities that belong to a service organization and are involved in providing goods and services.	• Franchises • Dealerships
Customers (B2B)	The external customers in the business-to-business model who use goods and services.	• Accounts • Contacts
Configuring households	The external customers in the business-to-consumer model who use goods and services.	• Consumers • Households
Employees and staff members	The people who work at internal and external service organizations and assist customers.	• Internal employees • External agents • External staff
Roles	Job functions that are performed by various users in the service organization.	• Location managers • Location agents • Location consumer agents • Location relationship managers • Location manager contributors
Responsibility definitions	Definitions of the responsibilities that an agent can perform for a customer or that a consumer can perform for another consumer. Use these responsibilities to create relationships between agents and customers or between consumers.	• Location agents • Location consumer agents • Location contributors • Location manager contributors • Location manager fulfiller • Location relationship manager

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Service Model Foundation entities (continued)

Entity	Definition	Examples
Relationships	Relationships that are created between agents and customers or between two consumers, are based on specific responsibilities. Use these relationships to provide additional access to data.	• Relationships between an employee or staff member and a customer • Relationships between two consumers

Industry-specific data model scenarios

The Service Model Foundation data model is vital for modeling the business organization structure. It can be configured and applied across different industry verticals. Each example demonstrates how internal and external business locations, service organizations, and customer relationships are structured to support real-world operational models.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Exploring Service Model Foundation across industries

The following examples showcase how organizations in various industries, such as Public Sector Digital Services, Financial Services Operations, Healthcare and Life Sciences, Manufacturing Commercial Operations, and Retail Operations can configure service organizations and define relationships between internal users, external entities, and customers. These scenarios highlight the flexibility of SMF in modeling complex hierarchies, managing service delivery, and aligning roles with real-world use cases.

Use case: Managing customers and accounts across branch locations in Financial Services Operations

Overview: This use case demonstrates how multinational financial institutions operate through a network of business locations including corporate headquarters (HQs), regional HQs, company branches, and independent advisor locations.

Each location serves a specific purpose and employs staff such as managers, employees, and advisors who manage customers or accounts.

To maintain data accuracy, visibility, and access control, the organization uses Service Model Foundation to model its hierarchy, define roles, and manage relationships between employees, customers, and locations.

Problem Scenario: FinServe Ltd, a leading financial services organization, faced recurring issues with access inconsistencies and customer ownership conflicts across its network of internal and external branches.

Challenges observed:

- Duplicate ownership of accounts: Multiple employees from different branches could view or modify the same customer records.
- Access violations: External advisors were unintentionally gaining visibility into internal business accounts.

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- Ambiguous customer relationships: No clear indication of which employee or branch was responsible for a given customer or account.
- Complex maintenance overhead: Updating location hierarchies or reassigning employees caused broken relationships and permission mismatches.

These challenges led to data governance risks, reduced customer trust, and increased manual effort to resolve access disputes.

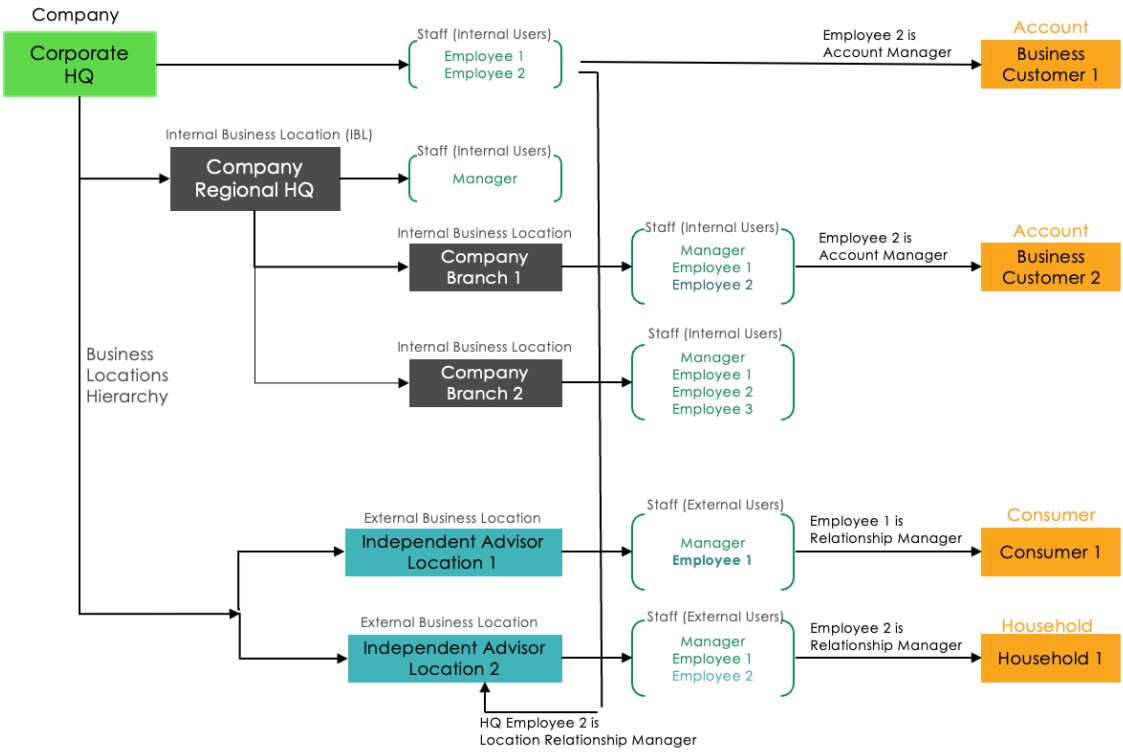
Personas involved:

- Corporate HQ employees: Manage top-level operations and key business accounts.
- Regional HQ managers – Supervise branch activities and oversee local business accounts.
- Branch employees – Handle day-to-day customer transactions and business relationships.
- Independent advisors (external users) – Manage consumer and household customers.
- Customers – Represent either business entities or individual consumers.

Prerequisites:

- The organization's business hierarchy (corporate HQ, regional HQs, branches, independent advisors) is defined in SMF as business locations.
- Internal and external users are assigned to their respective locations with appropriate personas (for example, manager, employee, relationship manager).
- Customers and accounts are registered in the system and linked to a responsible employee.

Business location and access hierarchy in a financial institution



Resolution workflow/ Solution implementation:

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1. Define the business location hierarchy
   - The organization establishes a structured hierarchy of business locations:
     - Corporate HQ: Parent company
     - Regional HQs: Oversee multiple internal branches
     - Company branches: Manage business customers
     - Independent advisor locations: External entities managing consumer and household accounts
   - Each location type is defined as either internal or external based on ownership and access level.
2. Assign staff to locations
   - Corporate HQ and branches are staffed by internal users.
   - Independent advisor locations include external users operating under partnership agreements.
   - Each staff member is mapped to their business location and assigned a role (like, manager, employee, and advisor).
3. Establish customer and account relationships
   - Customers (business, consumer, or household) are linked to specific employees.
   - Each employee has a defined responsibility:
     - A corporate HQ employee is an account manager for a business customer.
     - Branch employee is an account manager for a regional business customer.
     - An independent advisor is a relationship manager for a consumer or household.

   Each employee was linked to their respective customers or accounts. This mapping removed ownership conflicts and clarified accountability.
4. Determine access control and data visibility

   SMF automatically applied access rules based on persona and business location.

   - Access to records such as accounts or customer profiles is based on:
     - The employee's assigned business location.
     - Their relationship role (for example, account manager, relationship manager, and the likes).
     - The hierarchy defined in SMF.
   - For example:
     - Employee 2 at a corporate HQ can access Business Customer 1.
     - Employee 2 at Branch 1 can access Business Customer 2.
     - Advisor Employee 1 can view and manage Consumer 1.
5. Manage location relationships
   - Corporate HQ staff, such as Employee 2, may act as location relationship managers, maintaining oversight of external advisor locations.
   - Similarity, HQ Employee 2 can review activity for advisor locations 1 and 2.

   This confirms that external partner activities align with company standards and compliance policies.

Result:

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By applying the Service Model Foundation data model, FinServe Ltd resolved access inconsistencies and ownership conflicts across multiple business locations. The framework provided a unified, secure, and transparent approach to managing customer relationships in a large-scale financial environment.

Use case: Managing patients, healthcare providers, and accounts in Healthcare and Life Sciences

Overview: This use case demonstrates how a multinational healthcare organization operates through a network of business locations, including corporate headquarters (HQs), regional clinical HQs, hospitals or clinics, and independent provider or research locations.

Each location serves a specific purpose and employs staff such as administrators, clinicians, and external partners who manage patient accounts, clinical studies, or healthcare services.

To maintain data accuracy, visibility, and access control, the organization uses Service Model Foundation to model its hierarchy, define roles, and manage relationships between employees, patients, and locations.

Problem Scenario: HealthCorp Ltd, a leading healthcare organization, faced recurring issues with access inconsistencies and patient/account management conflicts across its internal and external locations.

Challenges observed:

- Duplicate patient records: Multiple employees from different locations could view or modify the same patient data.
- Access violations: External research or provider partners were unintentionally gaining visibility into internal clinical records.
- Ambiguous account ownership: No clear indication of which employee, clinician, or location was responsible for a given patient or clinical study.
- Complex maintenance overhead: Updating location hierarchies or reassigning staff caused broken relationships and permission mismatches.

These challenges led to compliance risks, reduced patient trust, and increased manual effort to resolve access disputes.

Personas involved:

- Corporate HQ administrators: Manage top-level operations, approvals, and key accounts.
- Regional HQ managers: Supervise hospitals or clinical branches and oversee local patient or clinical accounts.
- Hospital or clinic staff: Handle day-to-day patient care, appointments, and healthcare service delivery.
- Independent providers or research partners (external users): Manage patient interactions, clinical studies, or research programs.
- Patients or clinical participants: Represent either individual patients, households, or healthcare accounts.

Prerequisites:

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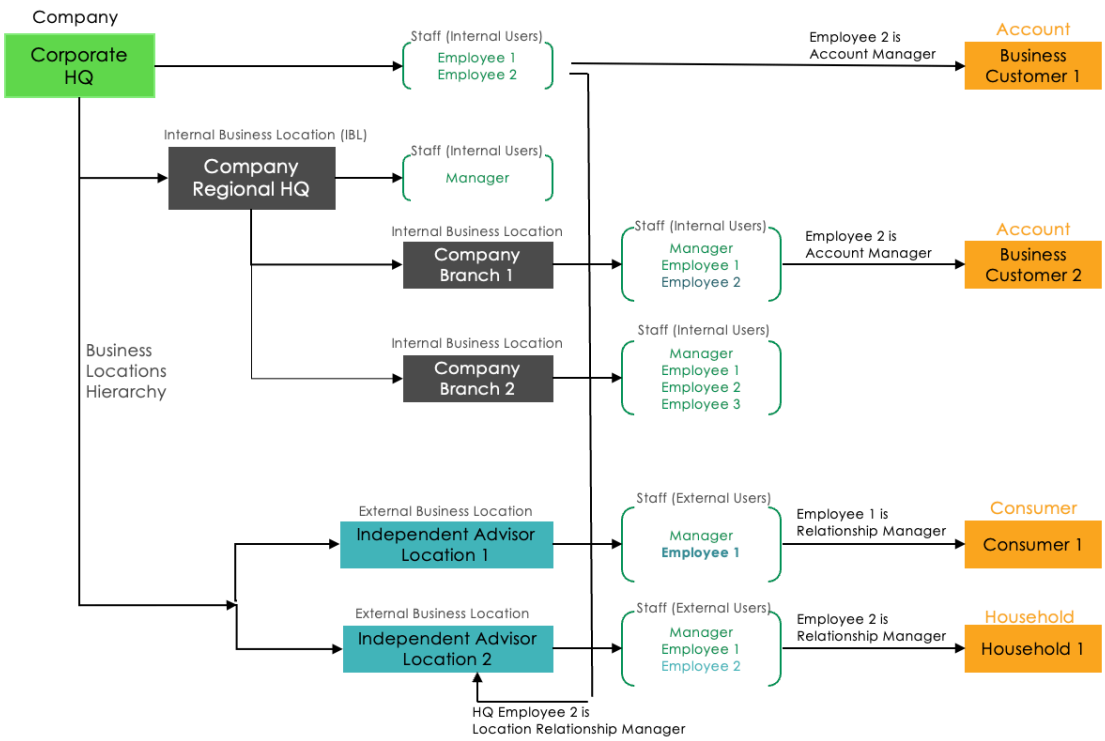
- The organization's business hierarchy (corporate HQ, regional HQs, hospitals or clinics, independent providers) is defined in SMF as business locations.
- Internal and external users are assigned to their respective locations with appropriate personas (for example, administrator, clinician, researcher, relationship manager).
- Patients and healthcare accounts are registered in the system and linked to a responsible employee.

Business location and access hierarchy in Healthcare and Life Sciences



Resolution workflow/ Solution implementation:

1. Define the business location hierarchy
   - The organization establishes a structured hierarchy of business locations:
     - Corporate HQ: Parent organization
     - Regional HQs: Oversee multiple hospitals or clinics
     - Hospitals or clinics: Manage patient and clinical accounts
     - Independent provider or research locations: External entities managing patient or research accounts
   - Each location type is defined as either internal or external based on ownership and access level.
2. Assign staff to locations
   - Corporate HQ and hospitals or clinics are staffed by internal users.
   - Independent provider or research locations include external users operating under partnership agreements.
   - Each staff member is mapped to their business location and assigned a role (for example, administrator, clinician, researcher, relationship manager).
3. Establish patient and account relationships

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- Patients or accounts (individuals, households, clinical studies) are linked to specific employees.
- Each employee has a defined responsibility:
  - A corporate HQ employee is an account manager for a large healthcare account.
  - A hospital clinician is responsible for patient accounts.
  - An independent provider or researcher manages clinical or research participants.

Each employee is linked to their respective patients or accounts, removing ownership conflicts and clarifying accountability.

4. Determine access control and data visibility

   SMF automatically applies access rules based on persona and business location.

   - Access to records such as patient data, clinical studies, or accounts are based on:
     - The employee's assigned business location.
     - Their relationship role (for example, clinician, researcher, account manager, and the likes).
     - The hierarchy defined in SMF.
   - For example:
     - Employee 2 at a corporate HQ can access Corporate Patient Account 1.
     - Clinician Employee 1 at Clinic Branch 1 can access Clinic Patient Account 2.
     - Research Partner Employee 1 can view and manage participants in a clinical study.
5. Manage location relationships
   - Corporate HQ staff may act as location relationship managers, maintaining oversight of independent provider or research locations.
   - Similarity, HQ Employee 2 can review activity for multiple external research locations.

   This confirms that external partner activities align with company standards and compliance policies.

Result:

By applying the Service Model Foundation data model, HealthCorp Ltd resolved access inconsistencies and account ownership conflicts across multiple healthcare locations. The framework provided a unified, secure, and transparent approach to managing patient and clinical accounts in a large-scale HCLS environment.

Use case: Managing citizen households, government services, and staff in Public Sector Digital Services

This use case demonstrates how a public sector organization manages the delivery of digital services such as child support and other welfare programs across multiple internal business locations including state HQs, regional centers, and local offices.

Each center has staff responsible for assigned citizen households, confirming accurate data, role-based access, and efficient service delivery through the Service Model Foundation data model.

Problem Scenario: The Department of Social Services (DSS) encountered challenges managing relationships and access controls across its network of centers and households.

Challenges observed:

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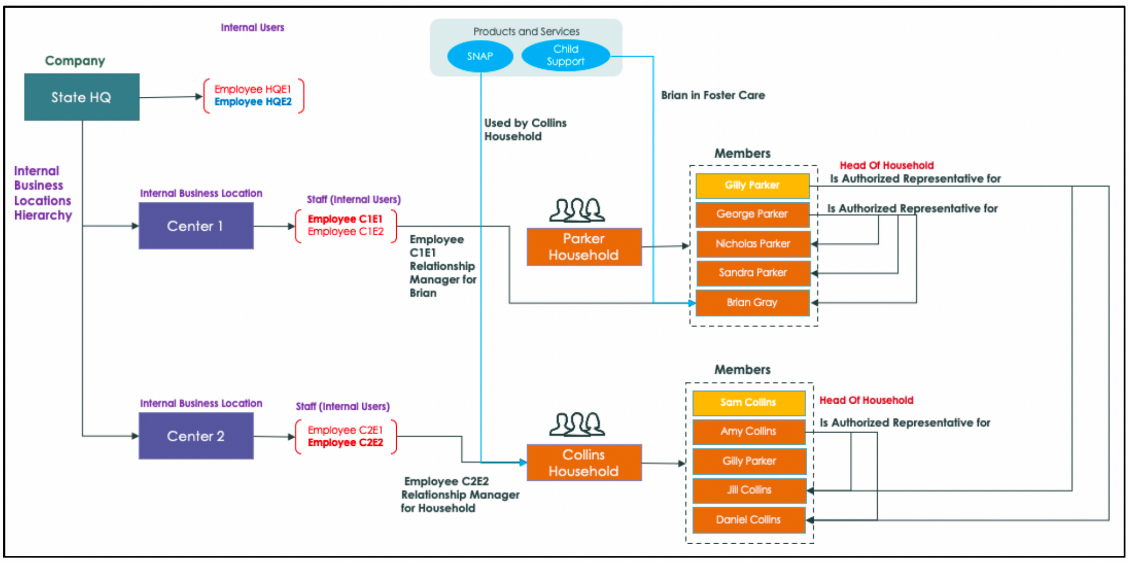
- Duplicate records across centers.
- Unauthorized access to other centers' cases.
- Unclear ownership of households.
- Maintenance issues when reassigning staff or locations.

These challenges led to data inconsistencies, compliance risks, and service inefficiencies.

Personas involved:

- State HQ staff: Oversee statewide programs and compliance.
- Center employees: Manage local household cases.
- Relationship managers: Primary contacts for assigned households.
- Citizens: Household members, including head of household and authorized representatives.

Business location and access hierarchy in Healthcare and Life Sciences



Resolution workflow/ Solution implementation:

1. Define the business location hierarchy
   - The organization establishes a structured hierarchy of business locations like, State HQ → Centers → Households.
   - Each location defined as internal and tied to defined service delivery responsibilities.
2. Assign staff to locations
   - HQ employees (HQE1 and HQE2): Manage statewide accounts and monitor regional activity.
   - Center staff (C1E1, C1E2, and the likes): Manage specific households and their services.
3. Establish household and case relationships
   - Households (for example, Parker Household and Collins Household) are linked to employees managing their cases.
   - Each household includes members with defined roles such as head of household and authorized representatives.
   - Employees act as relationship managers for their assigned households.
4. Determine access control

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SMF automatically applies access rules based on location, role, and relationships.

- Center employees see only their assigned households.
- HQ employees maintain oversight without modifying local records.
- Authorized household members can represent others within their household.

5. Manage inter-location relationships
   - HQ staff can review household data across centers for compliance.
   - Center staff collaborate when households span multiple service areas (for example, shared members or foster care scenarios).

Result:

By implementing the Service Model Foundation data model, DSS achieved:

- Clear household ownership and accountability across centers.
- Consistent access controls aligned with staff roles and business hierarchy.
- Improved data accuracy and reduced record duplication.
- Streamlined operations and compliance with data governance policies.

The framework enabled a unified, transparent, and secure management approach for Public Sector Digital Services delivery.

Service Model Foundation personas

Understand the key personas involved in managing and using Service Model Foundation and their responsibilities in supporting business locations and service operations.

> **Important:** Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Understanding Service Model Foundation personas

Service Model Foundation supports collaboration between multiple personas, each playing a distinct role in managing, delivering, and consuming services. Understanding these roles helps administrators assign the right access, responsibilities, and tools within the framework.

Service Model Foundation (SMF) supports access based on predefined personas that reflect the type of work users perform within a service organization. Because SMF is industry-agnostic, these personas aren't tied to specific job titles and can be tailored to match your organization's needs.

A single user can represent different personas across multiple business locations. For example, a user might act as a Location Manager at one branch and a Contributor at another. SMF models this flexibility through:

- Roles – Defined at the user level.
- Responsibilities – Defined according to business location.

The combination of user roles and responsibilities determines what a user can do within each service organization.

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Service Model Foundation user personas and their interactions with different industry verticals

Each following persona represents a different way users interact with business locations and service organizations.

Service Model Foundation user personas

Persona	Related role	Description	Industry vertical example
Bank branch teller	Service organization contributor	A service organization contributor is assigned to a specific service organization and can make requests on behalf of their business location. They can also view any cases submitted by others for their location.	**Banking**: At the local Solana Bank branch, tellers primarily handle customer requests in person that don't require case filing. Occasionally, they report operational issues or request support for their branch. These team members are service organization contributors.
Radiology operations associate	Location agent	A location agent works within a service organization to report issues and manage cases for both B2B and B2C customers at their business location.	**Healthcare**: The operations associate in the radiology department submits requests for patients and the department overall. They also fulfill requests assigned to radiology.
In-store customer care associate	Location consumer agent	A location consumer agent focuses specifically on B2C customers, reporting issues and managing cases assigned to their business location. Their role is similar to a location agent, but they're more centered on consumer interactions.	**Retail**: Solana Grocery has an in-store customer care department to assist shoppers. These customer care agents primarily interact with customers rather than working on the shop floor and are modeled as location consumer agents.
Hotel manager at a franchise location	Location manager contributor	A location manager contributor manages their business location teams while also submitting requests for issues that arise.	**Hospitality**: The front desk manager oversees daily operations and submits requests for support on behalf of

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Service Model Foundation user personas (continued)

Persona	Related role	Description	Industry vertical example
			the front desk and guests when needed.
College supervisor	Location manager	A location manager can contribute to their business locations, manage the team, and fulfill cases assigned to the location. This role combines the responsibilities of a location manager contributor with active case resolution.	**Higher Education**: The registrar manages a team that assists students with registration. They occasionally request help from other departments and temporarily add student workers to their team. The registrar also fulfills requests from students, professors, and other departments such as financial aid.
Inter-departmental support agent	Location support agent	A location support agent is assigned to a specific service organization and focuses on helping other business locations with their requests. They can view details about the organizations requesting support.	**Public Sector**: The Solana City government's shared services department fulfills requests from other departments, such as IT or purchasing. Staff serving other departments are modeled as location support agents.
Regional dealership liaison	Location relationship manager	A location relationship manager is responsible for managing relationships with external business locations. This role is dedicated to supporting third-party locations through a primary internal contact.	**Manufacturing**: Dealerships may be managed by external teams while representing the manufacturer. Solana Cars manufactures vehicles and sells them through a network of dealerships, some company-owned and others managed via dealer groups.
Platform configuration admin	Administrator	An administrator doesn't use the application directly, but supports	

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Service Model Foundation user personas (continued)

Persona	Related role	Description	Industry vertical example
		configuration of the service organization, hierarchy management, and assignment of member roles and responsibilities, including related-party configurations.	

Service Model Foundation roles

Roles that are included with the plugins that enable the Service Model Foundation feature.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

The following table describes the roles that the administrator can assign to the internal users.

Service Model Foundation roles

Role	Responsibility	Description	Contains roles
Organization Hierarchy Contributor [org_hierarchy_contributor]	Organization Hierarchy Contributor	Create and track cases on behalf of location hierarchy and for customer supported by those locations	
Organization Hierarchy Agent [org_hierarchy_agent]	Organization Hierarchy Agent	Resolves account cases associated with their location hierarchy	
Organization Hierarchy Consumer Agent [org_hierarchy_consumer_agent]	Organization Hierarchy Consumer Agent	Resolves consumer cases associated with their location hierarchy	
Business Organization Self Contributor [sn_bus_loc.business_org_self_contributor]	Business Organization Self Contributor	Create and track service cases for their assigned sold products and install base items at a business location, without any involvement. Can only access cases for sold products and install base items assigned	sn_customerservice.case_contributor_c

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
		at the respective business location	
Location agent [sn_customerservice.svc_location_agent]	Location agent	Create and fulfill cases for the accounts and contacts in the agent's business location	• sn_fsm_servicedesk_agent • sn_esm_location_agent
Location consumer agent [sn_customerservice.svc_location_consumer_agent]	Location consumer agent	Create and fulfill cases for the consumers and households in the agent's business location.	• sn_fsm_servicedesk_agent • sn_esm_location_agent
Location manager [sn_customerservice.svc_location_manager]	Location Manager Fulfiller	Create and update cases for accounts, contacts, consumers, and households that work with the business locations within their location hierarchy.	• sn_fsm_servicedesk_agent • sn_customerservice.svc_location_ag • sn_customerservice.svc_location_co • email_client_quick_message_author • sn_templated_snip.template_snippet • sn_shn.admin • approver_user • sn_publication.approver
Location manager contributor [sn_customerservice.svc_location_manager_contributor]	Location Manager Contributor	Manage service organizations and create cases for accounts, households, or consumers at the service organization	• sn_customerservice.service_organiza • sn_customerservice.svc_location_ma • sn_bus_loc.business_org_account_c • sn_bus_loc.business_org_consumer_

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
		or any of its child service organizations.	**Note:** The Location manager contributor reflects the role's containment after the *Remove Legacy Roles from Loc Mgr Contrib* job has been run. For upgrade customers who haven't run this job yet, this role still contains sn_customerservice.account_contr and sn_customerservice.consumer_cor instead. For more information, see Enable restricted customer access for Business Organizations.
Business Org Account Contributor [sn_bus_loc.business_org_account_contributor]	Business Org Account Contributor	Creates cases for accounts associated with their business organization using organization criteria-based restricted customer access. Tracks and manages cases created by them for the accounts associated with their business organization.	None
Business Org Consumer Contributor [sn_bus_loc.business_org_consumer_contributor]	Business Org Consumer Contributor	Creates cases for consumers and households associated with their business organization using organization criteria-based restricted customer access. Tracks and manages cases created by them	None

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
		for the consumers or households associated with their business organization.	
Location Project Member [sn_bus_loc.location_project_stakeholder]	None	Views project details and project tasks of their respective business location. Marks customer visible project tasks as complete. Assigns business organization project tasks to other location staff, project stakeholders, and assignment group.	None
Location Project Manager Contributor [sn_bus_loc.location_manager_project_stakeholder]	None	Views project details and project tasks of their respective business location and child business locations. Marks customer visible project tasks as complete. Assigns business organization project tasks to other location staff, project stakeholders, and assignment group.	None
EBL Viewer [sn_bus_loc.ebl_viewer]	None	Views all external business location details and location staff	None
IBL viewer [sn_bus_loc.ibl_viewer]	None	Views all internal business location details and location staff.	None
Service Organization Project Manager [sn_service_org.project_manager]	None	This role can perform the following actions:	• sn_bus_loc.ibl_viewer • sn_bus_loc.ebl_viewer

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
		• Project initiation: Creates and launches projects **Note:** Service Organization project manager and customer project manager can access all project modules. • Project planning: Develops project plans, such as, task assignments and resource allocation. **Note:** On task assignment, an automated mail is generated. Update "Send Email to Contact when Customer Project Task is assigned" flow to disable or enable notifications. • Task management: Monitors and manages task dependencies and execution. • Coordination: Views and collaborates with location staff, assigning, and tracking tasks of their respective location.	

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
Relationship agent [sn_customerservice.relationship_agent]	None	This role restricts an agent's access to only those cases for the accounts, contacts, consumers, and households that they have a relationship with. This role includes the following relationships that are provided with the Service Model Foundation plugins: • Account Manager: Creates a relationship between an internal user and an account. • Relationship Manager: Creates a relationship between an internal user and a consumer or a household.	• agent_workspace_user • snc_internal • sn_shn.editor • email_composer • sn_fsm_servicedesk_agent • sn_customerservice.csm_workspace • sn_templated_snip.template_snippet
Service Management agent [sn_esm_location_agent]	None	A service management agent role for a business location	• sn_lookup_verify_user • assignment_workbench • knowledge • agent_workspace_user • chat_admin • cmdb_read • agent_schedule_user • interaction_agent • sn_templated_snip.template_snippet • sn_shn.editor • template_editor • email_composer • template_editor_global
Location Support agent	Location Support Agent	This role resolves the cases originated from other business	sn_esm_location_agent

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
[sn_bus_loc.svc_location_support_agent]		organizations, ensuring access to required information and other details, and facilitating efficient coordination with store personnel **Note:** This role only applies to the internal business location.	
Service organization contributor [sn_customerservice.service_organization_contributor]	Location Contributor	This user: • works with accounts and contacts, consumers, and households • uses the Customer or Consumer Service Portal to assist customers • search knowledge articles and catalog items. • create cases on behalf of their business location, including cases for catalog items (requests), and follow up on those cases. • create cases from communication channels available to customers including phone, web, chat, Virtual Agent, and messaging. • view and follow up on other cases created for the user's business location.	• sn_customerservice.case_contributo • sn_service_org.service_criteria_read • sn_service_org.customer_criteria_rea

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Service Model Foundation roles (continued)

Role	Responsibility	Description	Contains roles
		If also an internal user on a case, this user can: • add additional comments and attachments • accept or reject a solution • close a case • receive notifications of case updates • read work notes	
Business Org Account Contributor [sn_bus_loc.business_org_account_contributor]	Business Org Account Contributor	Creates cases for accounts supported by their business organization. Tracks and manages cases created by them for the accounts associated with their business organization.	
Business Org Consumer Contributor [sn_bus_loc.business_org_consumer_contributor]	Business Org Consumer Contributor	Creates cases for consumers or households supported by their business organization. Tracks and manages cases created by them for the consumers or households associated with their business organization.	

Granular roles

Granular roles

Role name	Description	Inherited by	Inherits
sn_service_org.service_org_admin	Provides delete access to service organization, business location, internal business location, and external business location	sn_service_org.service_org	None

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Granular roles (continued)

Role name	Description	Inherited by	Inherits
sn_service_org.service_provider_external_staff_create	Provides create access to service organization external staff	sn_service_org.service_provider_admin	
sn_service_org.service_provider_external_staff_read	Provides read access to service organization external staff	sn_service_org.service_provider_admin	
sn_service_org.service_provider_external_staff_write	Provides write access to service organization external staff	sn_service_org.service_provider_admin	
sn_service_org.service_provider_external_staff_delete	Provides delete access to service organization external staff	sn_service_org.service_provider_admin	
sn_service_org.service_provider_assignment_group_create	Provides create access to service organization assignment groups	sn_service_org.service_provider_admin	
sn_service_org.service_provider_assignment_group_read	Provides read access to service organization assignment groups	sn_service_org.service_provider_admin	
sn_service_org.service_provider_assignment_group_write	Provides write access to service organization assignment groups	sn_service_org.service_provider_admin	
sn_service_org.service_provider_assignment_group_delete	Provides delete access to service organization assignment groups	sn_service_org.service_provider_admin	
sn_service_org.service_provider_criteria_create	Provides create access to organization criteria	sn_service_org.service_provider_admin	
sn_service_org.service_provider_criteria_read	Provides read access to organization criteria	sn_service_org.service_provider_admin	
sn_service_org.service_provider_criteria_write	Provides write access to organization criteria	sn_service_org.service_provider_admin	
sn_service_org.service_provider_criteria_delete	Provides delete access to organization criteria	sn_service_org.service_provider_admin	
sn_service_org.service_provider_customer_criteria_create	Provides create access to organization customer criteria	sn_service_org.service_provider_admin	

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Granular roles (continued)

Role name	Description	Inherited by	Inherits
sn_service_org.service_org_customer_criteria_read	Provides read access to organization customer criteria	sn_service_org.service_org_admin	None
sn_service_org.service_org_customer_criteria_write	Provides write access to organization customer criteria	sn_service_org.service_org_admin	None
sn_service_org.service_org_customer_criteria_delete	Provides delete access to organization customer criteria	sn_service_org.service_org_admin	None
sn_service_org.service_org_offering_service_read	Provides all CRUD access to outsourced customer service flow	None	• sn_service_org.service_external_staf • sn_service_org.service_external_staf • sn_service_org.service_external_staf • sn_service_org.service_external_staf • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_contractor.outsourced_service_pr • sn_csm_ocs.sn_csm_ocs_case_trans • sn_csm_ocs.sn_csm_ocs_case_trans • sn_csm_ocs.sn_csm_ocs_case_trans • sn_csm_ocs.sn_csm_ocs_case_trans
sn_contractor.outsourced_service_provider_create	Provides create access to outsourced service providers	sn_csm_ocs.csm_ocs_admin	None
sn_contractor.outsourced_service_provider_read	Provides read access to outsourced service providers	sn_csm_ocs.csm_ocs_admin	None
sn_contractor.outsourced_service_provider_write	Provides update access to outsourced service providers	sn_csm_ocs.csm_ocs_admin	None
sn_contractor.outsourced_service_provider_delete	Provides delete access to outsourced service providers	sn_csm_ocs.csm_ocs_admin	None

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Granular roles (continued)

Role name	Description	Inherited by	Inherits
sn_contractor.outsourced_service_provider_criteria_create	Provides create access to outsourcing criteria	sn_csm_ocs.csm_ocs_admin	No
sn_contractor.outsourced_service_provider_criteria_read	Provides read access to outsourcing criteria	sn_csm_ocs.csm_ocs_admin	No
sn_contractor.outsourced_service_provider_criteria_write	Provides update access to outsourcing criteria	sn_csm_ocs.csm_ocs_admin	No
sn_contractor.outsourced_service_provider_criteria_delete	Provides delete access to outsourcing criteria	sn_csm_ocs.csm_ocs_admin	No
sn_csm_ocs.csm_ocs_case_transfer_request_create	Provides create access to outsourced case transfer requests	sn_csm_ocs.csm_ocs_admin	No
sn_csm_ocs.csm_ocs_case_transfer_request_read	Provides read access to outsourced case transfer requests	sn_csm_ocs.csm_ocs_admin	No
sn_csm_ocs.csm_ocs_case_transfer_request_write	Provides write access to outsourced case transfer requests	sn_csm_ocs.csm_ocs_admin	No
sn_csm_ocs.csm_ocs_case_transfer_request_delete	Provides delete access to outsourced case transfer requests	sn_csm_ocs.csm_ocs_admin	No

Related topics

Granular admin roles

Granular admin roles

Granular admin roles enable organizations to assign specific administrative permissions based on functional responsibilities, replacing broad admin access with targeted role assignments.

The following table describes the granular admin roles that the administrator can assign to the internal users.

Service Model Foundation granular admin roles

Role name	Description	Inherited by	Inherits
sn_bus_loc.business_org_admin	Provides CRUD access to all Service Model Foundation tables	No	• sn_service_org.service_org_admin • sn_bus_loc.ibl_writer • sn_bus_loc.ebl_viewer • sn_bus_loc.ibl_viewer • sn_bus_loc.writer

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Service Model Foundation granular admin roles (continued)

Role name	Description	Inherited by	Inherits
sn_service_org.service_org_admin	Provides all CRUD access to service organization entities, which come under Service Model Foundation flows	sn_bus_loc.business_org_admin	• sn_service_org.viewer • sn_service_org.writer • sn_service_org.service_org_delete • sn_service_org.service_org_external_staff_ • sn_service_org.service_org_external_staff_ • sn_service_org.service_org_external_staff_ • sn_service_org.service_org_external_staff_ • sn_service_org.service_org_assignment_gr • sn_service_org.service_org_assignment_gr • sn_service_org.service_org_assignment_gr • sn_service_org.service_org_assignment_gr • sn_service_org.service_org_criteria_create • sn_service_org.service_org_criteria_read • sn_service_org.service_org_criteria_write • sn_service_org.service_org_criteria_delete • sn_service_org.service_org_customer_crite • sn_service_org.service_org_customer_crite • sn_service_org.service_org_customer_crite • sn_service_org.service_org_customer_crite • sn_service_org.service_criteria_write • sn_service_org.service_criteria_delete • sn_service_org.service_criteria_read • sn_service_org.service_criteria_create
sn_csm_ocs.csm_ocs_admin	Provide full CRUD access to Outsourced Customer Service flow	No	sn_service_org.service_external_staff.create sn_service_org.service_external_staff.read sn_service_org.service_external_staff.write sn_service_org.service_external_staff.delete sn_contractor.outsourced_service_provider_c sn_contractor.outsourced_service_provider_r sn_contractor.outsourced_service_provider_w sn_contractor.outsourced_service_provider_c sn_contractor.outsourced_service_provider_c sn_contractor.outsourced_service_provider_c sn_contractor.outsourced_service_provider_c sn_contractor.outsourced_service_provider_c sn_csm_ocs.sn_csm_ocs_case_transfer_requ sn_csm_ocs.sn_csm_ocs_case_transfer_requ sn_csm_ocs.sn_csm_ocs_case_transfer_requ sn_csm_ocs.sn_csm_ocs_case_transfer_requ

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Other granular admin roles for Service Model Foundation configuration

The following are the roles required to perform Service Model Foundation (SMF) configuration tasks:

Granular admin roles

Role name	Description	Plugin(s) required
sn_queryrules.admin	Provides admin access to all query rules.	com.snc.query_rules
user_admin	Administers users, groups, locations, and companies.	None
service_definition_admin	Provides full CRUD access to the service definition and related tables	None
sn_crm_account_relationship_data_manager	Extends the sn_crm_account_data_manager role by granting additional admin access to account relationships.	cs_base
sn_crm_consumer_relationship_data_manager	Extends the sn_crm_consumer_data_manager role by granting additional admin access to consumer relationships.	cs_base
sn_crm_household_relationship_data_manager	Extends the sn_crm_household_data_manager role by granting additional admin access to household relationships.It also contains sn_crm_consumer_relationship_data_manager role.	com.snc.cs_base/ com.snc.household/

Service Model Foundation responsibilities

A responsibility, or responsibility definition, describes a role or a function that supports a customer. Use responsibility definitions to create relationships between an agent and a customer or between two consumers.

When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another. The responsibility that is assigned to a relationship provides access to customer cases and information.

Service Model Foundation includes responsibility definitions that you can use to create relationships:

- Between agents and accounts, households, or consumers.
- Between two consumers.

The following responsibilities are provided with the Service Model Foundation plugins.

Note: Responsibilities are stored in the Responsibility Definition [sn_customerservice_responsibility_def] table.

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For the list of responsibilities included in the base system, see List of responsibilities provided with the base system. To create a responsibility, see Create a responsibility definition.

Customizing responsibility definitions

You can use the responsibility definitions provided with Service Model Foundation plugins. You can also modify these definitions or create your own definitions to meet your business requirements.

Note: If you modify the existing definitions or create definitions, you must update access control lists (ACLs) to reflect the changes.

If you have an existing account manager responsibility definition, you must evaluate the functionality of the account manager responsibility definition provided with the Service Model Foundation plugins.

Note: Creating and using responsibility definitions is a feature available in releases before Paris. Customers can create responsibility definitions using the Responsibility Definition (sn_customerservice_responsibility_def) table and use those definitions to create account teams using the Account Team Member (sn_customerservice_team_member) table. For more information, see Create account teams.

Create a unique responsibility definition

A responsibility definition can be unique, meaning that the responsibility can only be assigned to one user. To make a responsibility definition unique:

1. Navigate to **Customer Service** > **Administration** > **Responsibility Definitions**.
2. Select a responsibility definition.
3. Enable the **Unique** check box on the Responsibility Definition form.
4. Select **Update**.

When creating or updating records in the following tables, the system checks for and enforces unique responsibilities.

- Household Team Member [sn_customer_rel_household_to_user]
- Consumer Team Member [sn_customer_rel_consumer_to_user]
- Account Team Member [sn_customerservice_team_member]

For example, the following table describes the table type, an associated responsibility and the applied unique behavior.

Unique responsibility definition

Table	Responsibility Example	Unique behavior
Account Team Member	Account Manager	An account can have only one account manager but a user with the Account Manager responsibility can manage multiple accounts.
Consumer Team Member	Relationship Manager	A consumer can have only one Relationship Manager but a user with the Relationship Manager responsibility can manage multiple consumers.

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Unique responsibility definition (continued)

Table	Responsibility Example	Unique behavior
Household Team Member	Relationship Manager	A household can have only one Relationship Manager but a user with the Relationship Manager responsibility can manage multiple households.
	Org Hierarchy Contributor	Creates and tracks cases but can't fulfill.
	Org Hierarchy Agent	Fulfills and resolves business-customer cases
	Org Hierarchy Consumer Agent	Fulfills and resolves consumer cases.

Note: The unique behavior of a responsibility definition isn't enforced when the responsibility is used for relationships between consumers or household members.

Service Model Foundation relationships

Create relationships between an agent and a customer or between two consumers that provide additional access to customer data.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

With the Service Model Foundation feature, you can create relationships between the following users:

- Between an internal user and an account, household, or consumer.
- Between two consumers.

Relationships are based on responsibilities, or responsibility definitions. When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another. The responsibility that is assigned to a relationship provides access to customer cases and information.

The following relationships are provided with the Service Model Foundation plugins.

Relationships and Responsibilities for Service Model Foundation plugin

Relationship	Responsibility used in the relationship	Description
Account Team Member [sn_customerservice_team_member]	Account Manager	Create a relationship between an internal user and an account. **Note:** The internal user in this relationship must also be assigned the relationship agent role (sn_customerservice.relationship_agent).

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Relationships and Responsibilities for Service Model Foundation plugin (continued)

Relationship	Responsibility used in the relationship	Description
Consumer Team Member [sn_customer_rel_consumer_to_user]	Relationship Manager	Create a relationship between an internal user and a consumer. **Note:** The internal user in this relationship must also be assigned the relationship agent role (sn_customerservice.relationship_agent).
Household Team Member [sn_customer_rel_household_to_user]	Relationship Manager	Create a relationship between an internal user and a household. **Note:** The internal user in this relationship must also be assigned the relationship agent role (sn_customerservice.relationship_agent).
Consumer to Consumer [sn_customer_rel_consumer_to_consumer]	Authorized Representative	Create a relationship between two consumers, regardless of household.
Household Member Relationships [sn_customer_rel_household_member_relationship]	Authorized Representative	Create a relationship between two consumers within a household.

Relationships between internal users and customers

Internal users can have relationships with accounts, consumers, and households. These relationships provide internal users with additional access to customer cases and information. An internal user with a relationship to a customer can create and manage cases on behalf of that customer.

Relationships are created using responsibilities. Use the following responsibilities to create relationships between internal users and customers:

- Account Manager: Use this responsibility to create a relationship between a staff member and an account.
- Relationship Manager: Use this responsibility to create a relationship between a staff member and a household or a consumer.

Relationships that you create are added to the following related lists:

- Account Staff Relationships on the Business Location form
- Consumer Staff Relationships on the Business Location form
- Household Staff Relationships on the Business Location form
- Account Team on the Consumer form

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- Consumer Team on the Consumer form
- Household Team on the Household form

Relationships between consumers

Consumers can have relationships with other consumers. These relationships enable consumers to view and manage cases and information on behalf of other consumers.

Relationships are created using responsibilities. Use the Authorized Representative responsibility to create relationships between consumers. With this responsibility, you can:

- Create a relationship between two consumers, regardless of household.
- Create a relationship between two consumers within a household.

Relationships that you create are added to the following related lists:

- Member Relationships on the Household form
- Consumer Relationships on the Consumer form

Deleting relationships

When a relationship definition is deleted, all the relationships that use the definition are also deleted.

When a consumer is deleted, all the relationships to which the consumer belonged are also deleted.

When a household is deleted, all the relationships created for the household are also deleted.

When a consumer stops being a current member of a household, all the relationships created for the consumer within the household are also deleted.

Service Model Foundation tables and plugins

Tables that are included with or modified by the plugins that enable the Service Model Foundation feature.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

The Service Model Foundation feature adds new tables or modifies existing tables when you activate the following plugins:

- Business Location (com.snc.business_location)
- Customer Household Data Model (com.snc.household)
- Service Organization (com.snc.service_organization)
- Customer Service Base Extension Entities (com.snc.cs_base_extension)
- Customer Service Install Base Management (com.snc.install_base)

Business Location plugin

The Business Location plugin adds the following tables.

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Different table names for the Business Location plugin

Table	Description
Business Organization [sn_csm_business_location]	Extends the Organization Core [sn_customer_service_organization] table. A business location is one type of service organization. This table stores business location records.
Internal Organization [sn_csm_business_location_internal]	Extends the Business Organization [sn_csm_business_location] table. This table stores internal business location records. **Note:** An internal business location is a business location with the **Internal** field set to **true**.
External Organization [sn_csm_business_location_external]	Extends the Business Organization [sn_csm_business_location] table. This table stores external business location records. **Note:** An external business location is a business location with the **Internal** field set to **false**.

Customer Household Data Model plugin

The Customer Household Data Model plugin adds or modifies the following tables.

Table names for the Customer Household Data Model plugin

Table	Description
Household [csm_household]	Stores consumer household records. For the Service Model Foundation feature, this table is updated to support the head of household.
Household Member [csm_household_member]	Stores records of the consumers who have been added to households.
Household Team Member [sn_customer_rel_household_to_user]	Stores records for each of the household team member relationships that have been created between an internal user and a household.

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Table names for the Customer Household Data Model plugin (continued)

Table	Description
Household Member Relationship [sn_customer_rel_household_member_relationship]	Extends the Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer] table. This table stores records for each of the relationships that have been created between two consumers who belong to the same household.

Service Organization plugin

The Service Organization plugin adds the following tables.

Table names added by the Service Organization plugin

Table	Description
Service Organization [sn_customer_service_organization]	A unidirectional relationship between a company and a service organization, with a reference to the company record added from the service organization. Stores records for service organizations, including business locations and internal business locations. **Note:** The following new columns are replicated from the company [core_company] table to the service organization [sn_customer_service_organization] table: • Active: Track the operational status of the service organization. • Domain: Enable domain separation. • Company: Reference to the core_company table.
Service Organization Member [sn_csm_service_organization_member]	Stores records for the users who belong to internal service organizations.
External Organization Staff [sn_csm_service_organization_external_staff]	Extends the User [sys_user] table. Stores records for the users who belong to external service organizations.

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Table names added by the Service Organization plugin (continued)

Table	Description
	Note: If the **Company** field is populated, the **Service Organization** field displays only those service organizations that are associated with the company record. Similarly, if the **Service Organization** field is populated, the **Company** field displays only those companies that are associated with the service organization.
Organization Member Responsibility [sn_csm_svc_org_member_responsibility]	Configure the responsibilities of the staff working at service organizations or its extended entities.

Customer Service Base Extension Entities plugin

The Customer Service Base Extension Entities plugin adds the following tables.

Table names added by the Customer Service Base Extension Entities plugin

Table	Description
Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer]	Stores records for each of the relationships that have been created between two consumers, regardless of household.
Consumer Team Member [sn_customer_rel_consumer_to_user]	Stores records for each of the consumer team member relationships that have been created between an internal user and a consumer.

Customer Service Install Base Management plugin

The Customer Service Install Base Management plugin adds the Consumer Sold Product [sn_install_base_m2m_consumer_sold_product] table. This table stores records for each sold product (products and components) that have been sold to a consumer.

Tables used by Service Model Foundation

Tables from existing plugins that are used by the Service Model Foundation feature to support customers.

Existing plugins and tables used by the Service Model Foundation feature

Plugin	Table	New columns
Case Management Core (com.sn_customerservice)	Responsibility Definition [sn_customerservice_responsibility]	
	Account Team Member	

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Existing plugins and tables used by the Service Model Foundation feature (continued)

Plugin	Table	New columns
	[sn_customerservice_team_member]	
	Related Party Configuration [sn_customerservice_related_party_configuration]	
	Case [sn_customersrevice_case]	Household Service Organization Consumer Profile
Customer Service Install Base Management (com.snc.install_base)	Sold Product [sn_install_base_sold_product]	Household Consumer Profile
	Install Base Item [sn_install_base_item]	Consumer Profile
Customer Service Management for Orders (com.snc.csm.order)	Order [csm_order]	Household Service Organization

Service Model Foundation table access by role

The user roles that can access the Service Model Foundation tables.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Table	Create	Read	Update	Delete
Organization Core [sn_customer_service_organization]		• CSM manager • Customer agent • Consumer agent		
Business Organization [sn_csm_business_location]		• CSM manager • Customer agent • Consumer agent • Location manager		

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Table	Create	Read	Update	Delete
		• Location agent • Location consumer agent		
Internal Organization [sn_csm_business_location_internal]		• CSM manager • Customer agent • Consumer agent • Location manager • Location agent • Location consumer agent • Location manager contributor • Service organization contributor		
External Organization [sn_csm_business_location_external]		• CSM manager • Customer agent • Consumer agent • Location manager contributor • Location relationship manager • Service organization contributor		
Service Organization Member [sn_csm_service_organization_member]	• CSM manager • location managers (for their hierarchy only)	• CSM manager • Customer agent • Consumer agent	• CSM manager • Location managers (for their hierarchy only)	• CSM manager • Location managers (for their hierarchy only)

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Table	Create	Read	Update	Delete
		• Location managers (for their hierarchy only) • Location agents (for their locations only) • Location consumer agents (their locations only)		
Household [csm_household]		• CSM manager • Consumer agent • Location manager • Location consumer agent • Relationship agents (for households they have relationships with) • Consumers (for their households)	CSM manager	
Household Member [csm_household_member]	CSM manager	• CSM manager • Consumer agent • Location manager • Location consumer agent • Relationship agents (for households they have relationships with) • Consumers (for households	• CSM manager • Relationship agents (for households they have relationships with)	

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Table	Create	Read	Update	Delete
		where they're head of household or for consumers that they represent)		
Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer]	CSM manager	• CSM manager • Consumer agent • Location manager • Location consumer agent	CSM manager	
Household Member Relationship [sn_customer_rel_household_member_relationship]	CSM manager	• CSM manager • Consumer agent • Location manager • Location consumer agent	CSM manager	
Account Team Member [sn_customerservice_team_member]	• CSM manager • Location manager	• CSM manager • customer agent • Location manager • Location agents (for their locations) • Relationship agents (for accounts that they have relationships with)	• CSM manager • Location manager	• CSM manager • Location manager
Consumer Team Member [sn_customer_rel_consumer_to_user]	• CSM manager • Location manager	• CSM manager • Consumer agent • Location manager	• CSM manager • Location manager	• CSM manager • Location manager

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Table	Create	Read	Update	Delete
		• Location consumer agents (for their locations) • Relationship agents (for consumers that they have relationships with)		
Household Team Member [sn_customer_rel_household_to_user]	• CSM manager • Location manager	• CSM managers • Consumer agents • Location manager • Location consumer agents (for their locations) • Relationship agents (for households that they have relationships with)	• CSM manager • Location manager	• CSM manager • Location manager

Service Model Foundation modules

The Service Model Foundation plugins add several modules to the application navigator.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Business Location modules

Service Organizations > Internal/External Business Locations: This module lists the internal and external business locations that have been created.

Note: This module is available in Agent Workspace and in the platform interface.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_agent
- sn_customerservice.svc_location_consumer_agent

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Service Organization External Staffs module

Service Organizations > Service Organization External Staffs: This module lists the external staff members created and added to the external business location.

Note: This module is available in Agent Workspace and in the platform interface.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_agent
- sn_customerservice.svc_location_consumer_agent

Household modules

- Customer > Households: Lists the households that a user has access to.
- Customer > Household Members: Lists the consumers that have been added to households.

Note: These modules are available in Agent Workspace and in the platform interface.

Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_consumer_agent
- sn_customerservice.relationship_agent
- sn_crm_household_data_manager
- sn_crm_household_relationship_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin

Customer Relationship modules

- Customer Relationships > Consumer Team Members: Lists the relationships that have been created between an internal user and a consumer.
- Customer Relationships > Household Team Members: Lists the relationships that have been created between an internal user and a household.
- Customer Relationships > Consumer Relationships: Lists the relationships that have been created between two consumers, regardless of household.
- Customer Relationships > Household Relationships: Lists the relationships that have been created between two consumers who are members of the same household.

Note: These modules are only available in the platform interface. You can view relationships in Agent Workspace in related lists. Customer service managers and location managers can also modify account, consumer, and household team member relationships in Agent Workspace.

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Users with the following roles have access to these modules.

- sn_customerservice_manager
- sn_customerservice.consumer_agent
- sn_customerservice.svc_location_manager
- sn_customerservice.svc_location_consumer_agent

In addition to the preceding roles,

- the sn_crm_consumer_relationship_viewer, sn_crm_consumer_relationship_data_manager, sn_crm_household_relationship_data_manager, sn_crm_foundation_data_manager, and sn_crm_foundation_admin roles also have access to the Consumer Team Members module.
- the sn_crm_household_relationship_viewer, sn_crm_consumer_relationship_data_manager, sn_crm_household_relationship_data_manager, sn_crm_foundation_data_manager, and sn_crm_foundation_admin roles have the access to the Household Team Members and Householder Relatationships modules.

Service Model Foundation cases

Location agents and location consumer agents at a business location can create cases for accounts, contacts, consumers, and households.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Staff members with the location agent or location consumer agent role can do the following:

- View information for the customers at their location.
- Create cases for the accounts, contacts, households, and consumers.
- Update cases created at their location.
- Create consumers.

Case location

A case belongs to a business location. When a case is created by a location agent or manager, the **Service Organization** field on the Case form is automatically updated with the business location to which the agent or manager belongs. If the case is reassigned, this field is updated to that of the new agent or manager.

If the location agent or manager belongs to multiple locations, the **Service Organization** field can be kept empty. When you fill in this field, select carefully as the service organization controls a location agent's access to cases.

Note: A case can belong to only one business location.

The **Service Organization** can be set manually for a new case or changed for an existing case. Changing the **Service Organization** doesn't change the assigned agent.

Case access

Case access is controlled by the business location in the **Service Organization** field on the Case form. The following users can access cases:

- Staff members at the business location with the location agent or location consumer agent role.
- Managers at the business location with the location manager role.

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Cases for a business location are added to the Cases related list on the internal or external business location form.

- When a case is created, the service organization on the case is the service organization of the user who creates the case.
- When a case is assigned to an agent, the service organization on the case is updated to the service organization of the assigned agent.

Note: Only external staff with the location agent can act as fulfillers. For more information, see External Organization as a fulfiller.

Case access for consumers

Consumer type	Case access
Consumer	Can manage their own cases.
Head of household	Can manage cases for all household members.
Authorized representative, regardless of household	Can manage cases for the consumer they represent.
Authorized representative, inside of household	Can manage cases for the consumer they represent as long as both are current members of the household.

Case access for users

User	Required role	Case access
Location manager	Location manager	Can manage the cases in their location hierarchy.
Location staff member	Location agent Location consumer agent	Can manage the cases in their locations.
Account manager	Relationship agent	Can manage cases for their accounts.
Consumer relationship manager	Relationship agent	Can manage cases for their consumers.
Household relationship manager	Relationship agent	Can manage cases for their households.

External Organization as a fulfiller

External Organization (formerly External business location (EBL)) as a fulfiller enables partners, external agencies, and franchises to fulfill customer cases. You can use this capability to maintain consistent customer experiences across both internal and external organizations.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

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Overview of external organization

In the past, only location staff at internal organizations could resolve customer-related cases through both platform and workspace. External staff could only create cases from the business organization support portal (formerly business location service portal (BLSP)) but couldn't resolve them for the business organizations (formerly business locations). By using external organization as a fulfiller,

- external location agents having svc_location_agent and snc_external roles can access the platform to create and resolve cases, similar to internal location agents.
- external location consumer agents (having sn_customerservice.svc_location_consumer_agent and snc_external roles) can access the platform to create and resolve consumer cases, similar to internal location consumer agents.

You can activate this functionality by enabling the business location (com.snc.business_location) plugin.

Use case for external location agent

For example, the financial institution agencies perform various activities, from policy issuance to claims processing. These activities include underwriting, reviewing claims, and helping customers in claims submission. As most of these tasks are fulfillment activities currently performed by external members or third parties. Now, by using External Organization as a fulfiller capability, external location agents in these agencies can efficiently manage and resolve cases.

Use case for external location consumer agent

For example, hotels perform various activities, from guest check-in to billing and refund resolution. These activities include reviewing billed charges, processing refund requests, and helping guests resolve billing discrepancies. As most of these tasks are fulfillment activities currently performed by staff local to that specific hotel property. Now, by using External Location Consumer Agent as a fulfiller, hotel staff can efficiently manage and resolve refund cases raised by guests associated with that location — without escalating to a central organization.

Related topics

Access limitations for external location agents

Access limitations for external location agents

Explore the limitations that an external location agent faces when using various platform modules during case resolution. You can use this topic to get a comprehensive overview of the modules that are supported and unsupported with the external location agent persona.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Supported and unsupported modules

List of modules and submodules under the customer service platform that are supported and unsupported:

Modules	Submodules	Supported/unsupported
Overview		Supported
Knowledge		Supported

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Modules	Submodules	Supported/unsupported
Cases	Create New	Supported
	My Cases	
	Assigned to My Locations	
	Requested by My Locations	
	All	
	Open	
	Unassigned	
	Escalated	
Escalations	All	Supported
Customer	Partners	Supported
	Accounts	
	Contacts	
Customer Relationships	Account Team Members	Supported
Business Organizations	Internal Organizations (formerly Internal Business Locations)	Supported
	External Organizations (formerly External Business Locations)	
	External Organization Staff (formerly Service Organization External Staffs)	
Contracts	Service Contracts	Unsupported
	Entitlements	
Products	Assets	Supported
	Product Models	Unsupported **Note:** All configuration management database (CMDB) tables are unsupported.
	Outsourced Service Providers	Supported
Interaction	All	Unsupported
	Active	
	Assigned to Me	
	Overview	
Special Handling Notes	Special Handling Notes	Supported
Configuration		Unsupported
Knowledge > **Articles**	Create New	Unsupported

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Modules	Submodules	Supported/unsupported
	Import Articles	
	Open Submissions	
	Unpublished	Supported
	Published	
	Retired	
	All	
Knowledge > **Feedback Management**	My Flagged	Supported
	My Submitted Tasks	
	My Assigned Tasks	
	My Closed Tasks	
Knowledge > **Homepage**		Supported
Knowledge > **Notification Settings**		Unsupported
Email Client	Email Drafts	Unsupported
Workspaces	CSM Configurable Workspace	Unsupported **Note:** All aspects of the workspace experience remain inaccessible to external location agents.

Other notable limitations:

- The Launch Interactive Analysis option in the Case list form context menu isn't functional.
- Related cases can't be accessed from the related search results on the Case.

However, with an external organization as a fulfiller, the external location agents can:

- Access Service Model Foundation data, such as internal organization, external organization, organization members (formerly service organization members), and responsibilities, on the platform.
- Access customer foundation data, including accounts, contacts, sold products, and install base items on the platform.
- Access the case form on the platform.
- Self-assign and start working on a case.
- View related search results.
- Add comments or work notes.
- View the activity stream, work notes, and case timelines.
- Add resolution notes, propose a solution, and close the case.
- Create and update case tasks.
- View service definitions.

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Access limitations for external location consumer agents

Explore the limitations that an external location consumer agent (having sn_customerservice.svc_location_consumer_agent and snc_external roles) faces when using various platform modules during case resolution. You can use this topic to get a comprehensive overview of the modules that are supported and unsupported with the external location consumer agent persona.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Supported and unsupported modules

List of modules and submodules under the consumer service platform that are supported and unsupported:

Modules	Submodules	Supported/unsupported
Overview		Supported
Knowledge		Supported
Cases	Create New	Supported
	My Cases	
	Assigned to My Locations	
	Requested by My Locations	
	All	
	Open	
	Unassigned	
	Escalated	
Customer	Consumer	Supported
	Households	
Customer Relationships	Consumer Team Members	Supported
	Household Team Members	
Business Organizations	Internal Organizations (formerly Internal Business Locations)	Supported
	External Organizations (formerly External Business Locations)	
	External Organization Staff (formerly Service Organization External Staffs)	
Workspaces	CSM Configurable Workspace	Unsupported

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Modules	Submodules	Supported/unsupported
		Note: All aspects of the workspace experience remain inaccessible to external location agents.

The Launch Interactive Analysis option in the Case list form context menu isn't functional.

With an external organization as a fulfiller, you can create and manage cases for the households, and consumers from the platform. For more information on how to create and manage cases, see Create and manage cases for a business location.

Service Model Foundation business locations

Use the business location entity to create an organizational structure that includes internal and external business locations such as stores, branches, franchises, and dealerships.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

A business location is an extension of a service organization. The business location entity enables you to model the internal and external organizational structure involved in supporting customers. It also enables you to give agents the correct level of visibility into customer data.

With the business location entity you can:

- Create internal and external business locations using a hierarchy, with parent and child locations.
- Associate users within a business location, which makes them staff members of that location.
- Provide staff members at a business location with access to the customer cases and information for that location.
- Create teams of staff members to support accounts, consumers, and households.
- Provide the staff members on those teams with access that enables them to manage cases for their accounts, consumers, and households.

Creating a business location

Maintain an organizational structure by creating internal and external business locations. To create a business location, see Create a business organization.

Accessing business locations

Managers have access to their business location and to the business locations that are designated as child locations in the hierarchy.

When a user is added to the **Manager** field, the sn_customerservice.svc_location_manager role is automatically added to that user. You can also add a user as the manager for multiple business locations.

Staff members with the location agent role or location consumer agent role can perform the following actions:

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- Create cases for customers in their business locations.
- Access cases where the location in the **Service Organization** field on the Case form matches their business locations.

Create and manage cases for a business location

As a staff member with the location agent role, create and manage cases for your business locations.

Before you begin

Role required: admin, sn_customerservice.svc_location_agent, and sn_customerservice.svc_location_manager

About this task

Staff members with the location agent role can do the following:

- View information for the customers at their location.
- Create cases for the accounts, contacts, households, and consumers at their location.
- Create consumers.
- Update cases created at their location.

A case belongs to one business location. When a case is created by a location agent or manager, the **Service Organization** field on the Case form is automatically updated with the business location that the agent or manager belongs to. If the case is reassigned, this field is updated to show the new agent or manager.

If the location agent or manager belongs to multiple locations, the **Service Organization** field may be kept empty. When you fill in this field, make your selection carefully because the service organization controls a location agent's access to cases.

The **Service Organization** can be set manually for a new case or changed for an existing case. Changing the **Service Organization** doesn't change the assigned agent.

Location agents and managers can create cases for business locations without adding an account, contact, or consumer. The location agent or manager who creates the case is added to the **Opened by** field.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** and select **Create New**.
2. **Optional:** Select the type of case that you want to create.
3. On the form, fill in the fields.
   For a description of the field values, see Case form.
4. Select **Submit**.

Related topics

Service Model Foundation cases

Assign responsibilities

Assign roles

Create a customer service case

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Create an account staff relationship

Create a relationship between a staff member at a business location and an account.

Before you begin

Role required: admin, sn_crm_account_relationship_data_manager, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can assign users who have been added as staff members to a business location to an account relationship.

- Administrators and customer service managers can assign a staff member from any location.
- Location managers can assign staff members from the locations that they have access to.

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create an account team member relationship, use the Account Manager responsibility.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Account Staff Relationships related list, select **New**.
   This related list shows the accounts that have a relationship with any staff member at that location.
4. In the **Account** field, select the account to which the staff member is assigned.
5. In the **Responsibility** field, select **Account Manager**.
6. In the **User** field, select the staff member to fulfill the responsibility.
7. Select **Submit**.
   The relationship is added to the Account Staff Relationships related list.

Create a consumer staff relationship

Create a relationship between a staff member at a business location and a consumer.

Before you begin

Role required: admin, sn_crm_consumer_relationship_data_manager, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

About this task

Users who have been added as staff members to a business location can be assigned a consumer relationship.

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- Administrators and customer service managers can assign a staff member from any location.
- Location managers can assign staff members from the locations that they have access to.

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a consumer relationship, use the Relationship Manager responsibility.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Consumer Staff Relationships related list, select **New**.
   This related list shows the consumers that have a relationship to any staff member for the location.
4. In the **Consumer** field, select the consumer to which the user is assigned.
5. In the **Responsibility** field, select the **Relationship Manager** responsibility.
6. In the **User** field, select the staff member to fulfill the responsibility.
7. Select **Submit**.
   The relationship is added to the Consumer Staff Relationships related list.

Create a household staff relationship

Create a relationship between a staff member at a business location and a household.

Before you begin

Role required: admin, sn_crm_household_relationship_data_manager, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

Users who have been added as staff members to a business location can be assigned a household relationship.

Relationships are based on responsibilities. A responsibility definition describes a role or a function that supports a customer or consumer. To create a household relationship, use the Relationship Manager responsibility.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Household Staff Relationships related list, select **New**.
   This related list shows the households that have a relationship to any staff member for the location.
4. In the **Household** field, select the consumer to which the user is assigned.
5. In the **Responsibility** field, select the **Relationship Manager** responsibility.

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6. In the **User** field, select the staff member to fulfill the responsibility.
7. Select **Submit**.
   The relationship is added to the Household Staff Relationships related list.

Create and manage sold products for a business location

Staff members with the location agent role can manage sold products for their business locations.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice.svc_location_agent, or admin

About this task

Staff members with the sn_customerservice_manager role can create sold products by choosing the appropriate product model. In contrast, staff members with the sn_customerservice.svc_location_agent role can only view the list of sold products installed at any service organization.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Sold Products related lists, select **New**.
4. On the form, fill in the fields.

Sold Product form

Field	Description
Name	Name of the sold product.
Product	Product model sold to the customer.
Parent Sold Product	If the sold product contains child components, reference to another sold product.
Service Organization	Internal or external entity that is involved in providing service to the customer. **Note:** The sold products are closely tied to the service organization. As an example, if you select a service organization, all the parent sold products come from the same service organization.

5. Select **Submit**.
   A sold product record is created for the selected business location.

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Related topics

Create a sold product

Create and manage install base items for a business location

As a staff member with the location agent role, create and manage install base items for your business locations.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice.svc_location_agent, or admin

About this task

Staff members with the sn_customerservice_manager role, create install base items by choosing the correct configuration item. Whereas the staff members with the sn_customerservice.svc_location_agent role, can view the list of install base items installed at any service organization.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select either an internal or an external business location.
3. In the Install Base Item related lists, select **New**.
4. On the form, fill in the fields.

Install Base Item form

Field	Description
Number	Unique ID of the install base item. The system automatically sets this field value, but you can change it.
Name	Name of the install base item.
Configuration Item	If the sold product contains child components, reference it to another sold product.
Service Organization	Internal or external entity that is involved in providing service to the customer.
Owned by	Business manager of the install base item.
Supported by	Configuration item supported by.

5. Select **Submit**.
   An install base item record is created for the selected business location.

Related topics

Create an install base item

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Service organization install base

Extend proactive customer support to the Service Model Foundation by tracking products and services at service organizations.

> **Important:** Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Business locations are extensions of a service organization and are critical to delivering customer service. They enable support for businesses that interact with customers through physical channels such as stores and branches, franchises, and dealerships. Business locations are often considered the face of a business, where consumers engage for information and purchase, as well as post-sales and ongoing support.

Businesses have multiple products installed at these locations to serve their customers. In the past, there was no easy way for companies to track and manage these products and services. It was only possible to track products and services for accounts and consumers, often resulting in broken equipment, delayed service, and lower customer satisfaction.

By extending proactive customer support to the Service Model Foundation, you can track sold products and install base items installed at service organizations.

Service organizations can:

- Track and manage products and services installed at a business location.
- Enable contributors at a business location to submit cases and request help.
- Create and resolve cases for sold products and install base items deployed at a business location.

Related topics

Sold products and install base plugins for service organizations

Assign roles

Sold products and install base plugins for service organizations

Track sold products & install base items for service organizations.

Sold Products and install base plugins for service organizations

Plugins are used by service organizations to track sold products and install base items.

Plugins for sold products and install base

Plugin Name	Description
Business Location [com.snc.business_location]	This plugin supports the Service Model Foundation where the corporation does business with customers through physical channels such as stores and branches.
Customer Service Install Base Management [com.snc.install_base]	This plugin enables customers to capture the current state of their install base and establish the relationship to any downstream entities that might impact their functioning.

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Related topics

Assign roles

Create and manage sold products for a business location

Create and manage install base items for a business location

Activating plugins for Service Model Foundation

In the Customer Service Management (CSM) application, you must activate the Business Location (com.snc.business_location) and CRM Household Entities (com.snc.household) plugins to enable the Service Model Foundation feature.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Activate plugins to enable the Service Model Foundation feature

Plugin	Description
Activate business locations	Activate this plugin to manage customer service for business locations. This plugin enables support for businesses that interact with customers through physical channels such as stores, branches, franchises, and dealerships.
Activate customer household data model	Activate this plugin to manage customer service for households. This plugin enables you to create households, define the members of a household, and identify relationships between household members.

Related topics

Activate business locations

Activate customer household data model

Activate business locations

Activate the Business Location plugin to manage customer service for business locations.

Before you begin

Role required: admin

About this task

The Business Location plugin (com.snc.business_location) enables support for businesses that interact with customers through physical channels such as stores, branches, franchises, brokers, agencies, and dealerships. Activating the Business Location plugin (com.snc.business_location) automatically activates the Service Organization plugin (com.snc.service_organization). It enables support for internal and external entities in your customer service structure, such as branches, stores, franchises, and dealerships.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Business Location plugin (com.snc.business_location).
3. Select **Activate**.

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Related topics

Activate customer household data model

Activate Opportunity Management for Business Locations

Activate the Opportunity Management for Business Location plugin to create and track opportunities across the lifecycle of the customer journey.

Before you begin

Role required: admin

About this task

The following items are installed with Opportunity Management for Business Locations:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Roles.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Opportunity Management for Business Locations plugin (sn_bus_org_opptym) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Opportunity Management for business location

Activate Order Management for Business Locations

Activate the Order Management for Business Location plugin to manage the complete order lifecycle.

Before you begin

Role required: admin

About this task

The following items are installed with Order Management for Business Locations:

- Plugins
- Store applications

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- Roles
- Scheduled jobs
- Tables

For more information, see Roles.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Order Management for Business Locations plugin (sn_bus_org_orm) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Order Management for business location

Activate Quote Management for Business Locations

Activate the Quote Management for Business Location plugin to create and track quotes by channel partners.

Before you begin

Role required: admin

About this task

The following items are installed with Quote Management for Business Locationspeer :

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Roles.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Quote Management for Business Locations plugin (sn_bus_org_qm) using the filter criteria and search bar.

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You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Related topics

Quote management for business organization

Integration with Sales Customer Relationship Management

Integrate Service Model Foundation with Sales Customer Relationship Management to enable business locations to operate as sellers. This integration triggers sales quote generation, order capture, and fulfillment.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Integrate with Order Management

Install the Order Management Business Locations plugin (com.snc.business_location_orm) to integrate Service Model Foundation with Order Management. You can manage customer orders and empower channel partner staff to create, modify, and track orders throughout the sales process with the integration of Service Model Foundation with Order Management.

Organization staff can create orders for customers to monitor and manage the orders for their locations effectively. To learn more about the integration of Order Management with Service Model Foundation, see Order Management for business location.

Integrate with Quote Management

Install the Quote Management Business Organization plugin (com.snc.business_organization_qm) to integrate Service Model Foundation with Quote Management.

The integration of Quote Management with Service Model Foundation application helps to update and manage integrations with downstream functionalities such as sales orders and other related processes. To learn more about the integration with Quote Management , see Quote management for business organization.

Integrate with Opportunity Management

Install the Opportunity Management business location plugin (com.snc.business_organization_opptym) to integrate Service Model Foundation with Opportunity Management.

This integration enables business location-based sales representatives to create, modify, and track sales opportunities throughout the sales process, ensuring they can address customer needs effectively and provide updates on opportunity status. The feature supports business locations (such as dealerships, stores, franchises, and resellers) which play a role in

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delivering customer service and driving product and service sales. For details, see Opportunity Management for business location.

Integrated roles

Roles	Description
sn_bus_loc.org_b2b_sales_order_specialist	Role assigned to organization staff to create and manage Leads, Quotes, Opportunities, and Orders for accounts.
sn_bus_loc.org_b2b_sales_rep	Role assigned to organization staff to create and manage Leads, Opportunity, and Quotes for accounts.
sn_bus_loc.org_b2c_sales_order_specialist	Role assigned to organization staff to create and manage Leads, Quotes, Opportunities, and Orders for consumers.
sn_bus_loc.org_b2c_sales_rep	Role assigned to organization staff to create and manage Leads, Quotes, and Opportunities for consumers.
sn_bus_loc.org_sales_mgr	Role assigned to organization staff to create and manage account and consumer related Leads, Quotes, Opportunities, and Orders for their hierarchy.

If a business organization enables Restricted Customer Access, the account and consumer visibility restriction also applies to sales personas such as B2B and B2C sales representatives. In other words, these personas can view only the accounts and consumers supported by their own business organization, and cannot view accounts and consumers supported by other business organizations. For upgrade customers, this restriction has no effect until an admin runs the *`Remove Legacy Roles from Loc Mgr Contrib`* scheduled job. For more information, see Enable restricted customer access for Business Organizations

Related topics

Order Management for business location

Quote management for business organization

Opportunity Management for business location

Order Management for business location

Integrate Service Model Foundation with Order Management to support channel sales.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Overview of the integration

Use the Order Management Business Locations plugin (com.snc.business_organization_orm) to perform the following actions.

- Create orders for business locations
- Modify and manage orders for the business locations
- Track seller and buyer details of the order

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Data model

The Customer Order Related Party [sn_ind_tmt_orm_customer_order_related_party] table is a list of service organizations. You can add a related party record to the table to provide access to another party that is different from the service organization associated with the customer order. All related parties listed as **Authorized organizations** and associated with a particular customer order have access to the order, the order line items, and all other related entities. Channel partners such as referral partners, influencer partners, and more can be added as related parties to an order.

Fields on the Customer Order Related Party table

Field	Description	Type
Customer Order	Customer order that the related party can access.	Reference
Type	Type of related party.	Reference
Responsibility	Responsibility associated with the related party. **Note:** The default responsibility is set to **default_responsibility**.	Reference
Channel partner	Channel partner whose members can access the order when added as a related party.	Reference
Class	Class of the record.	sys_class_name
Rank	A numerical value to establish the priority of the relationship.	Integer
Domain	Domain of the related party record.	Domain ID
Active	Current state of the record, whether active or inactive.	Boolean

Related topics

Roles

Activate Order Management for Business Locations

Roles

After successful integration of Order Management with Service Model Foundation, various roles are added to the list view menu.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Description of roles

Role	Description	Contains roles

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Organization B2B Sales Representative (sn_bus_org_orm.org_b2b_sales_rep)	This role enables organization staff to create and manage account-related offers at their specific locations.	• Location Org Viewer (sn_bus_loc.location_org_viewer) • Location Order Creator (sn_bus_loc_orm.location_order_creator) • Location Account Viewer (sn_bus_loc.location_account_viewer)
Organization B2B Approver (sn_bus_org_orm.org_b2b_approver)	This role enables organization staff to approve account-related orders at their specific locations. As a B2B order approver, you can only view the customer orders that are associated with your respective location.	This role contains the following inherited roles. • Location Org Viewer (sn_bus_loc.location_org_viewer) • Location Order Viewer (sn_bus_loc_orm.location_order_viewer) • Location Account Viewer (sn_bus_loc.location_account_viewer) • Business Organization B2B Approver (sn_bus_org_orm.org_b2b_approver)
Organization B2C Sales Representative (sn_bus_org_orm.org_b2c_sales_rep)	This role enables organization staff to create and manage consumer-related orders at their specific locations. They can also view consumer orders and associated order line items where both Consumer and Channel partner fields are	This role contains the following inherited roles. • Location Org Viewer (sn_bus_loc.location_org_viewer) • Location Order Creator (sn_bus_loc_orm.location_order_creator) • Location Consumer Viewer (sn_bus_loc.location_consumer_viewer) • Business Organization B2C Approver (sn_bus_org_orm.org_b2c_approver)

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	specified. As a B2C Order Approver, you can: • View consumer detailed and related order line items. • Update editable fields on the Customer Order form. • Update the status of orders.	
Organization B2C Approver (sn_bus_org_orm.org_b2c_approver)	This role enables organization staff to approve consumer-related orders at their specific locations.	This role contains the following inherited roles. • Location Org Viewer (sn_bus_loc.location_org_viewer) • Location Order Viewer (sn_bus_loc_orm.location_order_viewer) • Location Consumer Viewer (sn_bus_loc.location_consumer_viewer) • Business Organization B2C Sales Approver (sn_bus_org_orm_org.b2c_sales_approver)
Organization Sales Manager (sn_bus_org_orm.org_sales_mgr)	This role enables enterprise sales persona to create, manage, and approve account and consumer related orders for their assigned organizational hierarchy. They can view consumer-related orders and order line items across both parent	This role contains the following inherited roles • Location Org Hierarchy Viewer (sn_bus_loc.location_org_hierarchy_viewer) • Location Customer Order Agent (sn_bus_loc_orm.location_customer_order_agent) • Location Customer Order Approver (sn_bus_loc_orm.location_customer_order_approver) • Location Consumer Order Agent (sn_bus_loc_orm.location_customer_order_agent) • Location Consumer Order Approver (sn_bus_loc_orm.location_consumer_order_approver)

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	and child business locations. The Location Sales Manager has full access to create and approve all order types, including both B2B and B2C orders.	
sn_bus_org_orm.org_ui	Granular role for organization staff to ensures consistent sales order experience across all user interfaces.	None

Apart from the functional roles, users also need to have the Business organization UI (sn_bus_org_orm.org_ui) granular role to have a uniform experience across all user interfaces.

If a business organization enables Restricted Customer Access, the account and consumer visibility restriction also applies to sales personas such as B2B and B2C sales representatives. In other words, these personas can view only the accounts and consumers supported by their own business organization, and cannot view accounts and consumers supported by other business organizations. For upgrade customers, this restriction has no effect until an admin runs the *`Remove Legacy Roles from Loc Mgr Contrib`* scheduled job. For more information, see Enable restricted customer access for Business Organizations

Create an order for business organizations

Begin the ordering process in Order Management for business organizations by selecting a customer account or consumer and entering the required information to create a product order.

Before you begin

Plugins required:

- sn_bus_org_orm

Roles required:

- sn_bus_org_orm.org_b2b_sales_rep,
- sn_bus_org_orm.org_b2c_ sales_rep,
- sn_bus_org_orm.org_sales_mgr,
- sn_bus_org_orm.org_relationship_mgr, or
- sn_bus_loc.org_sales_mgr

- Confirm that the Business Function is set to Sales and the Business Organization is active.

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About this task

When you start an order, a pop-up prompts you to enter details. The pop-up window adapts based on your role. Either the **Account** or **Consumer** field appears.

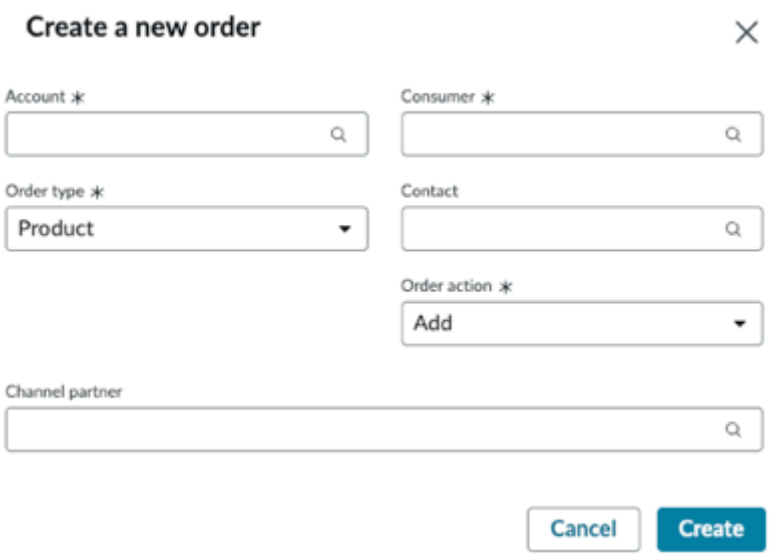
- If you have a B2B role, you can create orders for customer accounts.
- If you have a B2C role, you can create orders for consumers.

Note: Managers can also view child business locations and onboard agents to a business location.

Procedure

1. In the Configurable Workspace, select the List view.
2. Navigate to **Customer Orders** > **All** and select **New**.
   The Create a new order pop-up opens.

Create a new order



3. On the Create a new order pop-up, create an order for either an account or consumer.

To	Description
Create an order for an account	**a.** Select **Account**. **b.** Enter the following: ▪ **Order Type**: Order type can be service or customer. ▪ **Contact**: Name of the primary customer contact. ▪ **Order action**: Select the type of order action.
Create an order for a consumer	**a.** Select the **Consumer** name. **b.** Enter the following: ▪ **Order Type**: Order type can be service or customer. ▪ **Order action**: Select the type of order action.

4. In **Order action**, select **Add**.
5. Select the **Channel partner**.

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- The Channel Partner field is available only when the Order Management for Business Location store app (sn_bus_org_orm) is installed.
- The field is automatically prefilled if the agent is assigned to a single business location.

  Note: If the agent is assigned to multiple business locations, the field remains empty and must be selected manually.

- The field is also prefilled when an **Account** or **Consumer** is selected, based on its associated Channel Partner.

6. Select **Create**.

Result
The order is started and the Order Catalog opens.

Quote management for business organization

Integrate Service Model Foundation with Quote Management for business organizations to streamline operations and optimize the end-to-end life cycle for quote management.

Overview of quote management for business organization

Quote Management for business organizations enables sales agents and business organization staff to efficiently create and manage the end-to-end life cycle of quotes on behalf of customers.

Use the Quote Management Business Organization plugin (com.snc.business_organization_qm) to perform the following actions.

- Create quotes for customers through channel partners
- Modify and manage quotes for the business organization
- Track seller and buyer details of the quote

Data model

The Quote Management application is integrated with the product offering catalog to help sales agents build quotes easily and conveniently.

The Quote Management Customer Order Related Party table contains the following fields.

Fields on the Customer Quote Form

Field	Description	Type
Customer quote	Customer quote that the related party can access.	Reference
Type	Type of related party.	Reference
Responsibility	Responsibility associated with the related party. **Note:** The default responsibility is set to **default_responsibility**.	Reference

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Fields on the Customer Quote Form (continued)

Field	Description	Type
Channel partner	Channel partner whose members can access the quote when added as a related party.	Reference
Class	Class of the record.	sys_class_name
Domain	Domain of the related party record.	Domain ID
Active	State of the record, whether active or inactive.	Boolean

Related topics

Roles

Activate Quote Management for Business Locations

Roles

After successful integration of Order Management, the following menu items and roles are added to the list view menu.

Description of roles

Role	Description	Contains roles
Location Customer Quote Agent (sn_bus_org_qm.org_sales_mgr)	This role enables organization staff to create and manage account-related offers at their specific organizations.	• Location Quote Creator (sn_bus_org_qm.org_quote_creator) • Location Account Viewer (sn_bus_loc.location_account_viewer) • Location Organization Viewer (sn_bus_loc.location_org_viewer)
Organization ConsumerQuote Agent (sn_bus_org_qm.org_sales_mgr)	This role enables organization staff to approve account-related quotes at their specific organizations.	• Location Consumer Viewer (sn_bus_loc.location_consumer_viewer) • Location Organization Viewer (sn_bus_loc.location_org_viewer) • Organization Quote Creator (sn_bus_org_qm.org_quote_creator)
Relationship manager for quotes (sn_bus_org_qm.org_relationship_mgr)	This role enables enterprise sales personas to create, manage and approve	• sn_bus_loc_qm.location_consumer_quote_agent • sn_bus_loc_qm.location_customer_quote_agent • sn_bus_loc_qm.location_customer_quote_agent

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	account and consumer-related quotes for their assigned organization hierarchy.	
Organization Quote Manager (sn_bus_loc.org_sales_mgr)	This role enables enterprise sales personas to create, manage, and approve account and consumer-related orders for their assigned organizational hierarchy.	• Organization Consumer Quote Agent (sn_bus_org_qm.org_b2b_sales_rep) • Organization Consumer Quote Agent (sn_bus_org_qm.org_b2b_sales_rep) • Location Organization Hierarchy Viewer (sn_bus_loc.location_org_hierarchy_viewer)
sn_bus_org_qm.org_ui	Granular role for organization staff to ensure consistent sales quote experience across all user interfaces.	None

Note: For more information on channel partners see, ServiceNow Quote Experience.

If a business organization enables Restricted Customer Access, the account and consumer visibility restriction also applies to sales personas such as B2B and B2C sales representatives. In other words, these personas can view only the accounts and consumers supported by their own business organization, and cannot view accounts and consumers supported by other business organizations. For upgrade customers, this restriction has no effect until an admin runs the *`Remove Legacy Roles from Loc Mgr Contrib`* scheduled job. For more information, see Enable restricted customer access for Business Organizations

Create a quote for business organizations

Create a quote and manage the price breakdown of the products by verifying product price details. Agents can analyze price details, discuss with customers and resellers, and decide on the proposed quote.

Before you begin

Role required: admin

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About this task

The channel partners can view a detailed price breakdown for each quote line item, confirming transparency in net price calculations. Quotes can be exported as PDFs and shared with customers for confirmation and signatures, improving communication and record-keeping. Additionally, quote-related parties can be created to facilitate sharing quotes with other business organizations in multi-partner sales scenarios.

Procedure

1. Navigate to **All** > **Quote** > **New**.
2. Select **New**.
   The Quote Record page is displayed.
3. On the Quote New record form, fill in the fields.
   To learn more about the fields on the form, see ServiceNow Quote Experience.
4. Select **Submit**.

Result

The channel partners can generate and manage sales quotes for customers, simplifying the sales cycle.

The quote is created. The quote is added to the list seen on the Quote page. You can add a channel partner. You can generate a PDF to share the quote with customers for their validation and confirmation.

Opportunity Management for business location

Integrate Service Model Foundation with Opportunity Management for Business Locations to support channel sales.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Overview of the integration

Use the Opportunity Management for Business Locations plugin (com.snc.business_organization_opptym) to perform the following actions.

- Create opportunities for business locations
- Modify and manage opportunities for the business locations
- Track the end-to-end life cycle of opportunities
- Enable external channel partners to track opportunities.

To create an opportunity for business location, see Create an opportunity.

Data model

The Opportunity Related Channel Partner [sn_bus_org_opptym_related_business_organization] table is a list of service organizations. You can add a related party record to the table to provide access to another party that is different from the service organization associated with the customer opportunity. All related parties listed as **Authorized organizations** and associated with a particular customer opportunity have access to the opportunity, the order line items, and all other related entities. Channel partners such as referral partners, influencer partners, and more can be added as related parties to an opportunity.

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Fields on the Opportunity Management Related Party table

Field	Description	Type
Opportunity	Opportunity that the related party can access.	Reference
Opportunity Role	Type of related party.	Reference
Responsibility	Responsibility associated with the related party.	Reference
Domain	Domain of the related party record.	Domain ID
Domain Path		Domain Path
Class	Class of the record.	sys_class_name
Order	Numerical value assigned to determine the sequence to display the records.	Integer
Channel partner	Channel partner whose members can access the order when added as a related party.	Reference
Active	Current state of the record, whether active or inactive.	Boolean
Deal registration	Reference to Deal Registration (sn_prm_dr_deal_registration).	Reference
Program	Reference to Partner Program (sn_prm_partner_program).	Reference
Deal Registration Type	Reference to Deal Registration Type (sn_prm_dr_deal_registration_type).	Reference

Related topics

Roles

Activate Opportunity Management for Business Locations

Roles

After successful integration of Opportunity Management with Service Model Foundation, various roles are added to the list view menu.

Description of roles

Role	Description	Contains roles

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Organization B2B Sales Representative (sn_bus_org_opptym.org_b2b_sales_rep)	Functional role for creating location Opportunity for account.	• Location Org Viewer (sn_bus_loc.location_org_viewer) • Location Opportunity Creator (sn_bus_org_opptym.org_opportunity_c • Location Account Viewer (sn_bus_loc.location_account_viewer)
Organization B2C Sales Representative (sn_bus_org_opptym.org_b2c_sales_rep)	Functional role for creating location opportunity for consumers.	This role contains the following inherited r • Location Org Viewer (sn_bus_loc.location_org_viewer) • Location Opportunity Creator (sn_bus_org_opptym.org_opportunity_c • Location Consumer Viewer (sn_bus_loc.location_account_viewer)
Organization Sales Manager (sn_bus_org_opptym.org_sales_mgr)	Functional role for location opportunity managers. They can create location opportunities for accounts and consumers for their hierarchy.	This role contains the following inherited r • Location Org Hierarchy Viewer (sn_bus_loc.location_org_hierarchy_vie • Organization B2B Sales Representative (sn_bus_org_opptym.org_b2b_sales_rep • Organization B2C Sales Representative (sn_bus_org_opptym.org_b2c_sales_rep
Organization Opportunity Relationship Manager(sn_bus_org_opptym.org_relationship_mgr)	Functional role for enterprise partner relationship managers. They're responsible for building and managing relationships with multiple channel partners. They can create, manage, and approve account and consumer-related	This role contains Organization Sales Man (sn_bus_org_opptym.org_sales_mgr)

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	opportunities within their assigned organizational hierarchy.	
sn_bus_org_opptym.org_ui	Granular role for organization staff to ensure consistent opportunities experience across all user interfaces.	None

If a business organization enables Restricted Customer Access, the account and consumer visibility restriction also applies to sales personas such as B2B and B2C sales representatives. In other words, these personas can view only the accounts and consumers supported by their own business organization, and cannot view accounts and consumers supported by other business organizations. For upgrade customers, this restriction has no effect until an admin runs the *Remove Legacy Roles from Loc Mgr Contrib* scheduled job. For more information, see Enable restricted customer access for Business Organizations

Activate query rules

Set the query rules system property [sn_cs_queryrules.use_query_rules] value to **true**. For upgrade customers, once set to **true**, you must migrate any changes made in before query business rules to the query rules feature and validate them.

Ensure you have sn_queryrules.admin role to activate the query rules.

Configure forms and lists

Configure forms to add the fields and related lists that are necessary to support the business location and household data models.

Before you begin

Role required: One of the following:

- admin
- csm_guided_setup_user designated as a delegated developer

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Service Model Foundation category, select **Get Started**.
3. Select **Configure Forms and List**.
4. Add the following related lists to the Consumer form for these views: Case and Workspace.
   - Current Households
   - Household Member > Consumer (All Households)
   - Consumer Relationships
   - Household Relationships

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- Consumer Team Member > Consumer (Consumer Team)
- Sold Products

5. Add the **Service Organization** field to the Case form for these views: Case and Workspace.
6. Add the **Requesting Service Organization** field to the Case form for these views: Case and Workspace.
7. Add the **Updated by** field to the Case form for these views: Case and Workspace.
8. Add the **Household** field to the Case form for these views: Case and Workspace.
9. Add the **Primary Household** (Household) field to the Consumer form for these views: Case and Workspace.

   Note: After the **Household** field is added to the Consumer form for both case and workspace views, observe the following behavior: The form for a new consumer doesn't have a **Primary Household** field.

10. Add the following related lists to the Sold Products form for these views: Case and Workspace.

    - All Consumers
    - More Consumers

11. Add the **Household** field to the Entitlement form for these views: Case and Workspace.
12. Add the **Household** field to the Contract form for these views: Case and Workspace.
13. Add the **Household** field to the Sold Product form for these views: Case and Workspace.
14. Add the following related lists to the Service Organization form for these views: Case and Workspace.

    - Members
    - Cases > Service Organization (Cases)
    - Account Staff Relationships
    - Consumer Staff Relationships
    - Household Staff Relationships

15. Add the following related lists to the Household form for these views: Case and Workspace.

    - Current Members
    - Household Member > Household (All Members)
    - Household Member Relationship > Household (Member Relationships)
    - Household Team Member > Household (Household Team)
    - Case > Household (Cases)
    - Entitlement > Household (Entitlements)
    - Contract > Household (Contracts)
    - Sold Product > Household (Sold Products)

Create a business organization

Establish internal and external organization so that users and consumers at a business organization can create accounts, contacts, consumers, and households.

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Create business locations

Task	Description
Create an internal business location	Create an internal organization.
Create an external business location	Create an external organization.
Import business organizations with guided setup	Import existing internal and external organizations using guided setup.

Create an internal business location

Create an internal business location to enable users and consumers to create accounts, contacts, consumers, and households.

Before you begin

Role required: admin

About this task

A business location has a manager. When you create an internal business location, you add a user to the **Manager** field on the Internal Business Location form. Users then added as internal business location managers are automatically assigned the sn_customerservice.svc_location_manager_contributor role.

However, to assign the sn_customerservice.svc_location_manager role to the internal business location managers, the *sn_bus_loc.int_bus_loc.onboard_location_manager_as_contributor* system property must be set to **false**.

Note: Only internal users can be added as managers for internal business locations.

The manager of an internal business location can access all the cases for account, household, or consumer in the location hierarchy, including cases for child business locations. The manager can also:

- Add staff members to business locations in the location hierarchy.
- Create account team or consumer team relationships with staff members from the location hierarchy.
- View customer information.
- Update cases created in the location hierarchy.
- Create cases for customers in the location hierarchy.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal Business Locations**.
2. Select **New** on the Internal Business Locations list.
3. Fill in the fields on the Internal Business Location form.
4. Select **Submit**.

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The location is added to the Internal Business Locations list.

After creating an internal business location, add staff members to it. You can then create relationships with accounts, households, and consumers, and track customers served by that location.

What to do next

Create related lists as required:

Related tabs

Related list	Description
Business Organization	You can **Register Member**, or **Delete**, or **Copy URL** and can see all the organizations details.
Members	You can create, update, or delete members details
Child Internal Organizations	You can create, update, or delete a child internal organization details.
Child External Organizations	You can create, update, or delete a child external organization details.
Assignment Groups	Assign a assignment group to your organization
Organization Customer Criteria	Search and select a criteria for your organization
Cases Requested by Location	List and details of the cases requested by the location
Cases Assigned to Location	List and details of the cases assigned to your location
Sold Products	View details of sold products, including the Buyer organization member and Parent sold product. **Note:** A manager can assign a member by selecting **Assign member** and then choosing the buyer organization member.
Install Base Items	View details of install base items, including the Buyer organization member and Parent sold product. **Note:** A manager can assign a member by selecting **Assign member** and then choosing the buyer organization member.

Related topics

Create an external business location

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Create an external business location

Create an external business location to enable users and consumers to create accounts, contacts, consumers, and households.

Before you begin

Role required: admin

About this task

Both internal and external users can be added as managers for external business locations.

The manager of an external business location can access all the cases for an account, household, or consumer in the location hierarchy, including cases for child business locations. The manager can also:

- Create staff members for internal and external business location.
- Assign roles and responsibilities to the staff members.
- Assign staff members to the location.
- View and manage cases created in the location hierarchy.
- Submit a case on behalf of the location.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **External Business Locations**.
2. In the External Business Locations list, select **New**.
3. On the form, fill in the fields.
   For a description of the field values, see External Organization form.
4. Select **Submit**.
   The location is added to the External Business Locations list.

   After creating an external business location, add staff members to it. You can then create relationships between staff members and accounts, households, and consumers, and track the list of customers serviced by a business location.

What to do next

Create related lists as required:

Related tabs

Related list	Description
Members	You can create, update, or delete members details
Child External Organizations	You can create, update, or delete a child external organization details.
Assignment Groups	Assign a assignment group to your organization
Organization Customer Criteria	Search and select a criteria for your organization

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Related tabs (continued)

Related list	Description
Cases Requested by Location	List and details of the cases requested by the location
Cases Assigned to Location	List and details of the cases assigned to your location
Sold Products	View details of sold products, including the Buyer organization member and Parent sold product. **Note:** A manager can assign a member by selecting **Assign member** and then choosing the buyer organization member.
Install Base Items	View details of install base items, including the Buyer organization member and Parent sold product. **Note:** A manager can assign a member by selecting **Assign member** and then choosing the buyer organization member.

Related topics

Create an internal business location

Import business organizations with guided setup

Use Customer Service Management guided setup to import existing business organizations.

Before you begin

Role required: admin

About this task

After importing business organization data, you must also Set the business organization code property.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and select **Get Started**.
2. In the Service Model Foundation category, select **Get Started**.
3. Select **Import Business Organizations**.
4. Step1: Upload data from an external data source into an import set by selecting **Configure**.

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a. Fill in the following fields in the Load Data form.

Load Data form

Field	Description
Import set table	The data is imported into selected table ▪ **Create table**: A new table is created in the ServiceNow instance and the data is imported to this table. Provide a name for the table in the Name field. ▪ **Existing table**: Select this option and then select a table in the **Import set table** drop-down into which you want to import the data.
Source of the import	▪ **File**: Select this option to upload a CSV, XLS, or XML file. ▪ **Data Source**: Select this option and then select the data source type from the **Data source** drop-down.

b. Select **Submit**.

5. Step 2: Create a transform map.
6. Step 3: Execute the transform map to transfer the data from import set table to the target table.
7. Step 4: Verify that the data records are imported into the target table.

Organization codes and paths

An organization code is a unique identifier for a business organization, while an organization path establishes the organization hierarchy.

Organization codes

An organization code must be unique that identifies a business organization in a ServiceNow instance. Attempting to insert a new record with previously existing organization code in the Organization Core [sn_customer_service_organization] table, the value for the code results in the following error:

```
java.sql.BatchUpdateException: Duplicate entry for key
service_organization_path
```

Organization paths

An organization path establishes the hierarchy among different business organizations. This path is stored in the **Business Organization Path** on the Business Organization form.

An organization path is a combination of the organization codes for each business organization in the hierarchy. For example, let's use the following business organizations to demonstrate business organization paths.

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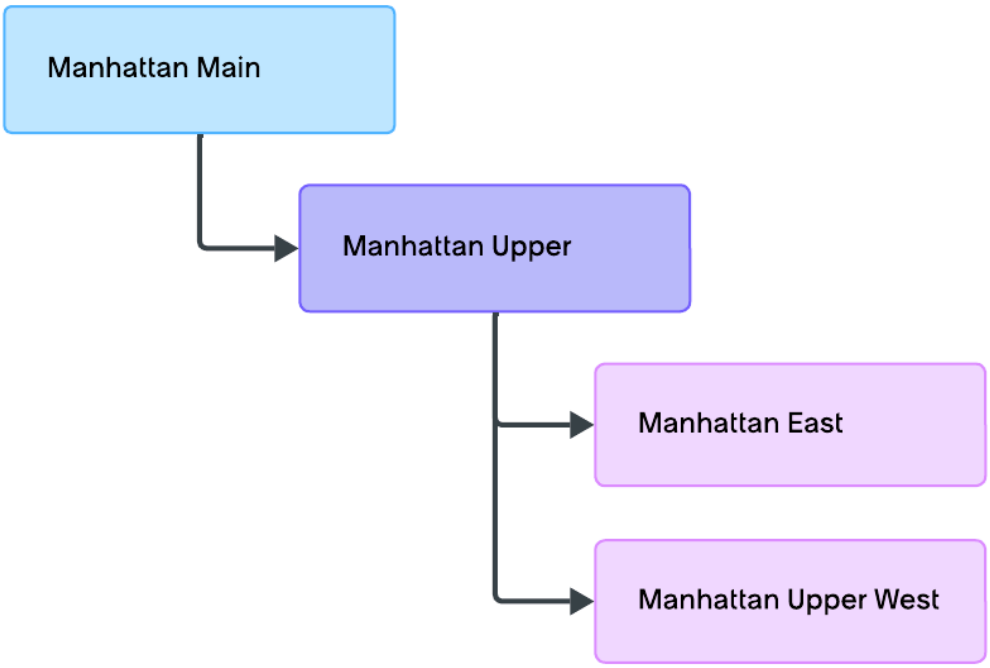

Example of business organizations to demonstrate organization paths

Business Organization	Organization code	Organization path
Manhattan Main	~~~~1	~~~~1 Manhattan main is the parent company. The business organization path for Manhattan main is the same as the organization code, which indicates that it's the first element in the hierarchy.
Manhattan Upper	~~~~2	~~~~1/~~~~2 Manhattan upper is a child company of Manhattan main. The structure of the business organization path is interpreted as Manhattan main/Manhattan upper.
Manhattan Upper East	~~~~3	~~~~1/~~~~2/~~~~3 Manhattan upper east is a child company of Manhattan upper and the structure of the business organization path is interpreted as Manhattan main/Manhattan upper/Manhattan upper east.
Manhattan Upper West	~~~~4	~~~~1/~~~~2/~~~~4

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Example of business organizations to demonstrate organization paths (continued)

Business Organization	Organization code	Organization path
		Manhattan Upper West is a child company of Manhattan Upper. The structure of this business organization path is interpreted as Manhattan main/Manhattan upper/Manhattan upper west.

Importing business organization records

If you create your business organization records by importing the data from some source system through a transform map, make sure that you execute the business rules. The organization Path is added, updated, and deleted based on the insertion, updating, and deletion of records in the Organization Core [sn_customer_service_organization] table through the business rules. If the business rules aren't executed, it can result in empty organization paths, which can then result in data access issues.

Note: If you don't execute the business rules during import, run the script in the **Update Organization Path** business rule for the newly imported records to set the organization paths correctly.

Set the business organization code property

After importing Business Organizations information, update the *com.snc.service_organization.last.generated.code.tree.path* property with the correct organization code value.

Before you begin

Role required: admin

About this task

The *com.snc.service_organization.last.generated.code.tree.path* system property stores the **Organization Code** value for the most recently created business organization in the Organization Core [sn_customer_service_organization] table.

When you create a business organization record, the system uses this property to generate a unique organization code. The property is then updated with the latest value, confirming the next business organization record receives a new unique code.

The value of the *com.snc.service_organization.last.generated.code.tree.path* property must match the value of the Organization Code field for the last inserted business organization record. When you create business organization records by importing data from other sources or instances, these values can get out of synchronization. If these values don't match, the system generates an error on the creation of the next new record in the Organization Core table:

```
java.sql.BatchUpdateException: Duplicate entry for key
service_organization_path
```

Use the following steps to fix this error.

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Procedure

1. Determine the highest or last used organization code value from the Organization Core [sn_customer_service_organization] table.
2. Navigate to the System Property [sys_properties] table.
3. Set the `com.snc.service_organization.last.generated.code.tree.path` property to the value determined in step 1.

Tracking the location details for a service organization

By tracking and capturing the location details for a service organization, you can provide Field Service Management, Walk-up Experience, and appointment booking capabilities.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Overview of service organization

You can provide Field Service Management, Walk-up Experience, and appointment booking capabilities through the service organization data model by capturing the Location (cmn_location) table details.

Note: You must activate the service organization (com.snc.service_organization) plugin before you can track the location details for a service organization.

Location field

On the Service Organization form, use the **Location** field to specify the organization's geographical location (cmn_location). The cmn_location on the service organization is synchronized with the address fields, but the address fields on the service organization aren't synchronized with the cmn_location. This arrangement makes it a one-way synchronization. The cmn_location is associated with the service organization in a two-way, one-to-one relationship.

Note: Changes to the cmn_location record don't update the address fields on the service organization.

The address fields on the service organization record that are synchronized with the location (cmn_location) include:

- Street
- City
- State
- Country
- Zip / Postal Code
- Latitude
- Longitude

Note: With the base system, the Location fields don't appear on the form or list views. If the location field on the service organization isn't defined, an on-demand script is shipped with the base system. The script generates the cmn_location record from the address fields.

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Common attributes of service organizations

By using common attributes to establish a unified reference architecture and data model, you can extend the Customer Service Management data model to support your service organizations.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

You can get use cases from industries like Financial Services Operations, Healthcare and Life Sciences, and Public Sector Digital Services, to capture common attributes for your architecture and data model. For example, a service organization may want to capture attributes for bank branches, hospitals, and agencies. By capturing these common attributes across industries, you can create a unified reference architecture and data model that avoids implementing the same attribute across different industries.

The following table lists the common attributes that have been identified across industries for the Organization Core [sn_customer_service_organization] table.

List of common attributes

Field Name	Description
Email	Primary email address for the service organization.
Identification number	ID that is used to identify the service organization.
Type	Type of primary service organization by industry. For example, branches, agencies, providers, stores, and so on.
Subtype	Organization types within the industry. For example, by using the **Type** and **Subtype** fields, you can select the multiple types to be used for your service organizations.

Adding and associating company records with a business location

Create a company record and associate it to an internal or an external business location.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Configuration tasks for associating company records with a business location

Task	Description
Add a new company	Create a company record that represents vendors, manufacturers, or customers with whom you do business.
Associate company records with a business location	Associate company records with a business location to indicate that a business location is a company.

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Associate company records with a business location

Associate your company records with a business location to enhance service organization data model adoption across different industry verticals.

Before you begin

Add the **Company** field to an internal or an external business location form using the form layout. For more information, see Add fields to a form layout in Table Builder.

> **Important:** Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Role required: admin, user_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Select the internal or external business location from the list that you want to associate a company record to.
3. Select the company record previously created from the Company field.
4. Select and hold (or right-click) in the header and select **Save**.

Result

The company record is successfully associated with a business location.

Virtual Agent support for business locations

Customer service agents receive chat requests from your business location staff members on the CSM Agent Workspace. These agents can assist your staff members to resolve issues and manage the cases more efficiently if your staff members fill out a pre-chat survey first.

> **Important:** Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Overview of pre-chat survey

Before your staff members can use a pre-chat survey to initiate a chat, your administrator must activate the pre-chat configuration for the Business Location Service Portal. The preconfigured surveys are activated by default in the base system. If your business location has upgraded the system to manually activate the pre-chat configuration, then staff members can fill in the pre-survey before the chat. To learn more about the pre-chat survey, see Pre-chat surveys.

You must also assign the service organization contributor (sn_customerservice.service_organization_contributor) and location manager (sn_customerservice.svc_location_manager_core) roles to the staff members using the pre-survey chat feature.

Let's say that a staff member with the correct role fills out a pre-chat survey on the Business Location Service Portal (BLSP). The chat is then assigned to a customer service agent or Virtual Agent via the advanced work assignment (AWA) routing. To learn more about AWA, see Exploring Advanced Work Assignment.

Before entering into a chat conversation with the staff member, the assigned agent reviews the context of the case so that agents know how to handle the case.

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Pre-chat survey

The pre-chat survey lets staff provide location and support details before a chat. It gives agents context about the case, enabling them to assist more effectively. The pre-chat survey makes the chat more efficient and helpful to your staff. To learn more about how a chat is initiated from the BLSP, see Chat with Virtual Agent from the Business Location Service Portal.

The pre-chat survey isn't displayed for service organization contributors who are associated with a single business location. The location is picked by default.

The business locations that are listed in the pre-chat configuration are limited to the locations that are assigned to the business location manager. You can't select a child business location.

To learn more about the configuration of the pre-chat surveys, see (Legacy) Define pre-chat survey configurations.

Related topics

Chat with Virtual Agent from the Business Location Service Portal

Chat with Virtual Agent from the Business Location Service Portal

Provide the information needed about a case and its resolution by completing a pre-survey on the Business Location Service Portal. This pre-chat survey lets the customer service agent or Virtual Agent know your location and key case details, so you don't have to repeat them.

Before you begin

Role required: Service Organization Contributor (sn_customerservice.service_organization_contributor) or Location Manager (sn_customerservice.svc_location_manager_core)

Procedure

1. In the Business Location Service Portal, select the Chat icon ( ) to start a conversation.

   Note: The agent chat configuration (sp_agent_chat_config) must be active for the Business Location Service Portal.

2. From the list of locations in the pre-chat survey, select the business location that you're directly associated with and select **Submit**.
   A virtual agent or a customer service agent responds to your chat request.
3. When you're finished with the chat, select **End Conversation**.

What to do next

If the agent creates a case or links the discussion to an existing case, you can view these cases from the Business Location Service Portal by selecting **Cases**.

Related topics

Virtual Agent support for business locations

Create customer projects

Create customer projects at internal or external business locations to manage location openings, renovations, closings, or other location-specific initiatives.

Before you begin

To access customer projects and to enable required roles, make sure that you enable the Customer Project Management (com.snc.csm_ppm) plugin.

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Role required: admin, it_project_manager, sn_service_org.project_manager

About this task

A customer project can be initiated by applying templates, or by importing and exporting projects. Furthermore, cases can be created to address issues either at the project or project task level.

> **Important:** Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

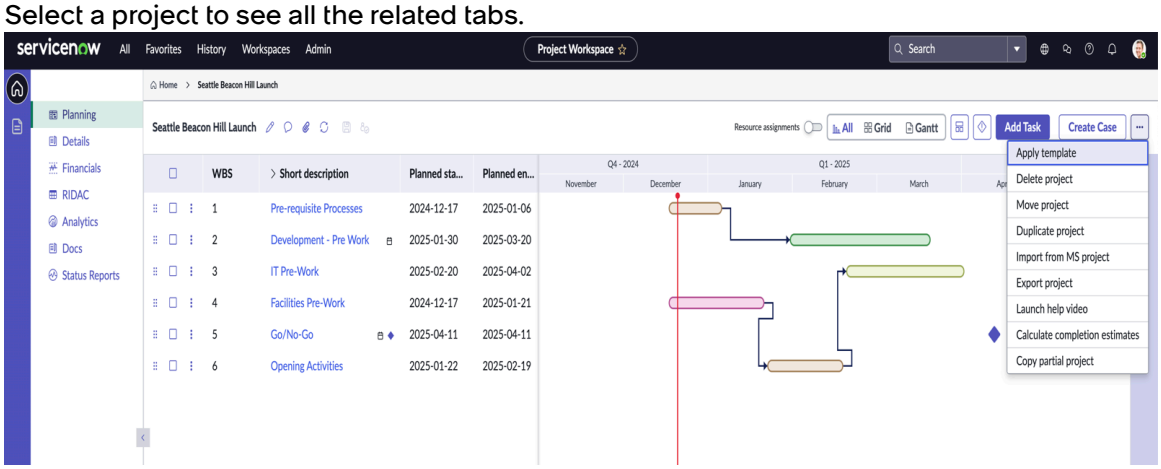
Procedure

1. Navigate to **Workspaces** > **Project Workspace**.
2. Initiate a project by selecting **New**.
   Under **My projects**, a list of projects associated with your role is displayed. Under **All projects**, a list of all projects is displayed.
3. On the form, fill in the fields.
   The following table outlines the unique fields of the form. To learn more about other fields, refer Starting a project.

Create Project form

Field	Description
Project class	Class of the project. Select **Customer Project**.
Project template	Template of a project. To create a project from template, select a template from the list displayed. Based on the template, project tasks are created.
Project name	Name for the project.

4. Select **Confirm**.
5. Select a project to see all the related tabs.



Customer Project related tabs

Related tabs	Description
Planning	In this section, you can:

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Related tabs	Description
	○ create or add tasks ○ update task details ○ create case for the project and project tasks ○ set deadlines using graph ○ apply template ○ delete, move, import, and export project ○ launch help videos ○ calculate completion estimates ○ copy partial project
Details	In this section, you can view and update all project tasks and details of the project.
Financials	Displays cost plans of the project
RIDAC	Displays risks of the project
Analytics	Enables you to track project phases, plans, assignments, issues, time elapsed, resources, benefits, and other details of the project graphically.
Docs	Docs of the project
Status Reports	Reports of the project

6. Under the **Details** tab, fill in the other fields.
   The following table outlines the unique fields of the customer project. To learn more about other fields, see Starting a project.

Customer Project form

Fields	Description
Account	Account for the project. Select an account from the displayed list. **Note:** ○ On selecting an account, the **Service Organization** field disappears. ○ The customer project manager can't access projects or project tasks associated with service organization project manager.
Service Organization	Service organization for the project. Select an internal business location (IBL) or external

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Fields	Description
	business location (EBL) from the displayed list. **Note:** ○ On selecting a service organization, the **Account** field disappears. ○ The service organization project manager can't access projects or project tasks associated with customer project manager.

What to do next

Create a project task from a project

Add staff members to a business location

Add users as staff members to a business location so that they can support accounts, contacts, consumers, and households.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Add staff members to internal and external business locations

Task	Description
Add staff members to an internal business location	Add internal users with the snc_internal role as staff members to an internal business location.
Add staff members to an external business location	Add both internal users with the snc_internal role and external users with the snc_external role as staff members to an external business location.

Related topics

Add staff members to an internal business location

Add staff members to an external business location

Add staff members to an internal business location

Add users as staff members to an internal business location to support accounts, contacts, consumers, and households.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can add internal users with the snc_internal role as staff members to an internal business location.

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- Administrators and customer service managers can add staff members to any business location.
- Location managers can add staff members to the business locations that they have access to.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal Business Locations**.
2. Select the desired internal business locations record.
3. Select the **Register Member** related link to open the Register Member at Internal Business Location record.
   Use the record to register new location staff or transfer existing internal or external staff between locations managed by the Location Manager, and assign responsibilities accordingly.
4. On the form, fill in the fields.

Register Member at Internal Business Location form

Field	Description
Internal Business Location	The automatically generated internal business location.
Member	Field used to select an internal staff member from the list of service organization internal staff record.
Member Type	Field used to assign responsibility for the member selected at the business location. To learn more about responsibilities, see Assign responsibilities.

5. Select **Submit**.

   A member record with the selected member, member type, and business location is created. After a member type is selected, the member is assigned to a responsibility automatically.

Add staff members to an external business location

Add users as staff members to an external business location to support accounts, contacts, consumers, and households.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can add both internal users with the snc_internal role and external users with the snc_external role as staff members to an external business location.

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- Administrators and customer service managers can add staff members to any business location.
- Location managers can add staff members to the business locations that they have access to.

Note: Adding new external staff members to the external business locations must be done using the service organization external staff module.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **External Business Locations**.
2. Select the desired external business locations record.
3. Select the **Register Member** related link to open the Register Member at External Business Location record.
   You can use the record to register new location staff or move existing staff between locations managed by the Location manager, and assign responsibilities to staff accordingly.
4. On the form, fill in the fields.

Register Member at External Business Location form

Field	Description
External Business Location	The automatically generated external business locations.
Register Staff	Field used to register new location staff or move existing staff from external business location hierarchy between locations. ○ **New Staff**: Create a user in External Organization Staff (sn_csm_service_organization_external_staff) table with (snc_external) role. ○ **Existing Staff**: List of staff members already working under the service organization hierarchy.
First Name	First name of the staff member.
Last Name	Family name of the staff member.
User ID	User ID of the staff member.
Email	Email address of the staff member.
Member	Field used to select an external staff member from the list of service organization external staff record. **Note:** This field appears only when **Existing Staff** is selected from the **Register** staff field.

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Field	Description
Member Type	Field used to assign responsibility for the selected business location. ○ **None**: Creates a member record. ○ **Listed Member**: Creates a member record. With the member record, a responsibility record is created with the type as Listed Member and the responsibility is empty. ○ **Location Contributor**: Creates a member record and along with the member record, a responsibility record is created with the type as Location Contributor and the responsibility as Location Contributor. **Note:** Assigning responsibility is applicable to both existing and new staff members.

5. Select **Submit**.
   A new external staff member record is created for the selected external business location. The admin must assign responsibilities to the staff members. However, if you have selected **None** as a member type, then you must not create a responsibility record.

Assign responsibilities

Use the responsibility data model to assign responsibilities to a service organization (SO) member.

Before you begin

Role required: admin

About this task

Businesses often need staff to work at more than one business location, and they can have different responsibilities at different locations. Using the responsibility data model, an SO member can be assigned multiple responsibilities.

The responsibility data model tracks the relationship between the SO members and their responsibility type in the Service Organization Member Responsibilities [sn_csm_svc_org_member_responsibility] table.

Note: If the business location plugin is active, this feature is enabled by default. However, for upgrade customer, the data in the [sn_csm_svc_org_member_responsibility] table will be auto-populated for existing SO members to confirm that they retain as much access after the upgrade. Any new records created after the Brazil release must be created using the following steps.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Internal/External Business Locations**.
2. Open the business location (internal or external) record.

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3. Open the SO Member record from the Members related list.
4. Select **New** to create a record in the SO Member Responsibilities [sn_csm_svc_org_member_responsibility] table.
   The Organization Member Responsibility record shows the following fields:
   a. **Member**: This field refers to the [sn_csm_service_organization_member] table and is auto-populated if the record is initiated from the SO Member related list.
   b. **Type**: This field refers to the [sn_customerservice_related_party_configuration] table
   c. **Order**: This field specifies the sequence in which records are displayed, organized according to business preferences.
   d. **Excluded Locations**: This field includes the list of locations that have to be excluded.

Note:

With the base system, users with a specific role can be assigned a particular type.

User roles and associated types

Responsibility	Name
Location Agent **Note:** This role only applies to the internal business location.	sn_customerservice.svc_location_agent
Location Consumer Agent **Note:** This role only applies to the internal business location.	sn_customerservice.svc_location_consumer_agent
Location Contributor	sn_customerservice.service_organization_contributor
Location Manager Contributor	sn_customerservice.svc_location_manager_contributor
Location Manager Fulfiller **Note:** This role only applies to the internal business location.	sn_customerservice.svc_location_manager
Location Relationship Manager **Note:** This role only applies to the external business location.	sn_bus_loc.location_relationship_manager
Location Support Agent	sn_bus_loc.svc_location_support_agent
Business Org Account Contributor	sn_bus_loc.business_org_account_contributor
Business Org Consumer Contributor	sn_bus_loc.business_org_consumer_contributor

5. After you assign the required related party type, select **Submit**.
   A new responsibility is added to the SO member.

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Assign roles

Assign roles to internal and external users to facilitate proper access to service organizations, business locations, and households. By assigning required roles, you can enable each user to have the necessary permissions to perform their tasks effectively.

Before you begin

Role required: admin

About this task

The Service Model Foundation plugins add the following roles to Customer Service Management.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Service Model Foundation roles

Role	Description	Contains roles
Location manager contributor [sn_customerservice.svc_location_manager_contributor]	A location manager contributor is employed at the business location and manages a business location in the location hierarchy along with all its child business locations. A location manager contributor performs the following tasks: • Manage service organization. • Manages staff at the business locations. • Track products and services at the business locations. • Report cases for any account, household, or consumer created at the parent or any child business locations.	• sn_customerservice.svc_location_manager_c • sn_customerservice.service_organization_co • sn_bus_loc.business_org_account_contribut • sn_bus_loc.business_org_consumer_contrib **Note:** The Location manager contributor reflects the role's containment after the Remove Legacy Roles from Loc Mgr Contrib job has been run. For upgrade customers who haven't run that job yet, this role still contains sn_customerservice.account_contributor and sn_customerservice.consumer_contributor instead. For more information, see Enable restricted customer access for Business Organizations.
Location relationship manager [sn_bus_loc.location_relationship_manager] **Note:** This role only applies to the external business locations.	A location relationship manager is employed by the parent business and acts as a point of contact for one or more external business locations. A location relationship manager performs the following tasks:	sn_customerservice.svc_location_manager_co

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Service Model Foundation roles (continued)

Role	Description	Contains roles
	• Manage and monitor all activities related to products and services at an external business location. • Monitor the performance of external business locations. • Respond to queries on case status from external business location stakeholders.	
Location agent [sn_customerservice.svc_location_agent] **Note:** This role only applies to the internal business location.	A location agent performs the following tasks: • View all customer service management (CSM) entities. • Create cases for any account, household, consumer, or service organization. • Fulfill cases for any account, household, consumer, or service organization created at the agent's location.	• sn_fsm_servicedesk_agent • sn_esm_location_agent
Location consumer agent [sn_customerservice.svc_location_consumer_agent] **Note:** This role only applies to the internal business location.	A location consumer agent performs the following tasks: • View all CSM entities. • Create cases for any account, household, consumer, or service organization. • Fulfill cases for any account, household, consumer, or service organization created at the service organization or any child service organization. • Assign related staff to any account, household, or consumer.	• sn_fsm_servicedesk_agent • sn_esm_location_agent

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Service Model Foundation roles (continued)

Role	Description	Contains roles
Location manager [sn_customerservice.svc_location_manager] **Note:** This role only applies to the internal business locations.	A location manager performs the following tasks: • View all CSM entities for a related account, household, consumer, or service organization. • Create, update, and close cases for any related account, household, consumer, or service organization created at the consumer's location.	• sn_fsm_servicedesk_agent • sn_customerservice.svc_location_agent • email_client_quick_message_author • sn_templated_snip.template_snippet_writer • sn_customerservice.svc_location_manager_c • sn_shn.admin • approver_user • sn_customerservice.svc_location_consumer_
Relationship agent [sn_customerservice.relationship_agent]	Manage cases for the accounts, contacts, consumers, and households that the agent has relationships with. It includes the following relationships that are provided with the Service Model Foundation plugins: • Account Manager: Creates a relationship between an internal user and an account. • Relationship Manager: Creates a relationship between an internal user and a consumer or a household.	• agent_workspace_user • sn_fsm_servicedesk_agent • snc_internal • sn_templated_snip.template_snippet_reader • sn_customerservice.csm_workspace_user • sn_shn.editor • email_composer
Service Management location agent [sn_esm_location_agent]	A service management location agent is an agent for a business location.	• sn_lookup_verify_user • assignment_workbench • knowledge • agent_workspace_user • actsub_user • template_editor • chat_admin • cmdb_read • agent_schedule_user • interaction_agent • sn_templated_snip.template_snippet_reader

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Service Model Foundation roles (continued)

Role	Description	Contains roles
		• sn_customerservice.csm_workspace_user • sn_shn.editor • email_composer • template_editor_global
Location support agent [sn_bus_loc.svc_location_support_agent]	A location support agent is a service organization member who acts as a fulfiller and can perform the following tasks: • View all CSM entities. • Create and resolve cases. • Access the CRM Workspace. • Use business location 360 to view details of internal and external business locations that they support, sold products, location members, install base items, and available services. **Note:** The role of location support agent isn't supported for external business locations since case fulfillment isn't enabled for these locations.	• sn_esm_location_agent • sn_csm_case_types.service_definition_viewe

Note: If contributor users, like relationship contributors, account contributors, or consumer contributors associated with business locations, have a location contributor (sn_customerservice.service_organization_contributor) role, they can access the business locations.

For the complete, current list of Service Model Foundation roles, see Service Model Foundation roles.

Procedure

- You can assign roles to users using the Service Model Foundation guided setup.
- You can also assign roles to users using the *ServiceNow AI Platform* user administration feature: Assign a role to a user.

Enable restricted customer access for Business Organizations

Run this one-time scheduled job to use the **Restricted Customer Access** configuration with organization customer criteria under Business Organizations. This procedure is applicable to customers upgrading from a previous release.

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Before you begin
Role required: admin

About this task
For upgrade customers, to let a business organization use Restricted Customer Access to limit what its Location Manager Contributor users can view, you must first remove that inherited, unrestricted access and replace it with the location-scoped Business Org Account Contributor and Business Org Consumer Contributor roles. Use the *`Remove Legacy Roles from Loc Mgr Contrib`* scheduled job to make this change.

Note: Run this job only if you want to use Restricted Customer Access configuration with organization criteria under Business Organizations.

Before the Brazil release, Location Manager Contributor users [sn_customerservice.svc_location_manager_contributor] inherited the Account contributor [sn_customerservice.account_contributor] and Consumer contributor [sn_customerservice.consumer_contributor] roles. Those two roles give location managers blanket access to all customer regardless of the criteria.

For new customers, this configuration is available by default.

Procedure
1. Navigate to the **All** > **System Definitions** > **Scheduled Jobs** module.
2. Open the **Remove Legacy Roles from Loc Mgr Contrib** job.
3. Select the **Execute Now** button on the form.
   The job removes the Account contributor and Consumer contributor roles from Location Manager Contributor.

   Note: Run this job once. Running it again has no additional effect once the roles have already been swapped.

   Rolling back: If you need to restore the previous behavior, run the *`Restore Legacy Roles to Loc Mgr Contrib`* scheduled job. This job adds back the Account contributor and Consumer contributor roles to Location Manager Contributor.

   Note: After a rollback, business organizations can no longer use Restricted Customer Access to limit the customer access.

Setting up assignment groups
Associate your assignment groups with an internal or an external business location. This association forms a one-to-many (1:M) relationship, which means, one or more groups can be associated with a service organization. This process makes it easier to route cases to the appropriate team member using the inter-organization support capability.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Configuration tasks for setting up assignment groups at a business location

Task	Description
Create a group	Create a group to associate it with a service organization.

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Configuration tasks for setting up assignment groups at a business location (continued)

Task	Description
Configuring a group	Configure a group that includes adding group members and assigning them required roles.
Associate a group to a business location	Establish a one-to-many (1:M) relationship between a group and a business location.
Add group members to a business location	Enroll group members to a business location and have a dedicated group working on cases.

Create a group

Create groups to assign work to team members based on specific requirements such as skills, location, and product models. This approach enables you to route cases to the appropriate team members.

Before you begin

Role required: user_admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. On the Group form, fill in the fields.

Group form

Field	Description
Name	The name of the group.
Group email	The group email address or the distribution list for the point of contact, such as the group manager. **Note:** By default, the group email address overrides the individual email addresses of the members.
Manager	The group manager or lead associated with the group.
Parent	The larger group to which this group belongs. If a group has a parent, the child group inherits the roles of the parent group. The members of the child group aren't members of the parent group.
Hourly rate	The amount charged according to hour to calculate costs for the tasks assigned to the group.

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Field	Description
Description	The detailed information about the group.

4. Select **Submit**.

What to do next

Configure a group by adding members and assigning them appropriate roles. For more information, see Configuring a group.

Configuring a group

Set up the group by adding members and assigning them the necessary roles. The group members inherit the roles of the group, so you don't have to assign roles to each member separately. This setup enables members within a group to perform specific field service tasks, filtered by location, skills, product models, and so on.

Add members to a group

Add a member to a group so that the member inherits all the roles assigned to the group.

Before you begin

Role required: user_admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group from the list that you want to add members to.
3. In the Group Members related list, select **Edit**.
4. Select and add one or more names to the Group Members List.
5. Select **Save**.

What to do next

Assign the required roles to the members of the group. For more information, see Assign required roles.

Assign required roles

You can assign one or more roles to a group to grant required access to the group members.

Before you begin

Role required: user_admin

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select the group from the list that you want to add roles to.
3. In the Roles related list, select **Edit**.
4. Select and add the required roles to the Roles List.
5. Select **Save**.

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Result

The roles are successfully added to the assignment group. You can now start associating these groups to a business location. For more information, see Associate a group to a business location.

Associate a group to a business location

Associate a group with the desired business location by establishing a one-to-many (1:M) relationship. This association helps you assign cases directly to the appropriate assignment groups.

Before you begin

Note: A group can only be associated with a single business location, but a business location can have multiple groups.

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal/External Business Locations**.
2. Select the internal or external business location from the list that you want to associate an assignment group to.
3. In the Assignment Groups related list, select **New**.
4. On the Organization Assignment Group form, fill in the fields.

Organization Assignment Group form

Field	Description
Service organization	Auto-populated with the name of the business location to which you're adding an assignment group.
Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

What to do next

Add group members to a business location. For more information, see Add group members to a business location.

Add group members to a business location

Enroll or add group members to a business location to create a dedicated group or team focused on specific cases.

Before you begin

Role required: admin

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

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Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Business Locations** > **Internal Business Locations**.
2. Select the internal business location from the list that you want to add group members to.
3. In the Members related list, select **Edit**.
4. Add the users from the associated group to the Members List.
5. Select **Save**.

Result

The member is successfully added to the assignment group. Based on your requirement, you can keep adding more members to the group and assign them a dedicated task.

Setting up products and available services at a business location

By setting up the relationships between organizations and users in the Customer Service Management (CSM) application, your organization can associate the products and services with the service organization (SO). The SO staff can address the customer queries about the products and services at a business location and even raise a case on the behalf of their customers.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Configuration tasks for setting up the products and available services

Task	Description
Create a service definition	Create a service definition record.
Service Definition form	Specify how a service organization provides its services by configuring the **Organizations offering Service** field in the sn_case_type_selection table.
Associate a product with a service definition	Associate one or more products with a service definition.
Associate service organizations with a service	Establish an association between products and available services to service organizations. This association can be done by defining the organization criteria.

Note: The service-related capabilities are available only after activating the Customer Service Case Types (sn_csm_case_types) plugin. The plugin is optional and must be enabled if you want to use these capabilities with business locations.

Setting up inter-organization support

Provide your agents at a business location with the visibility into other business locations that they support using the inter-organization support capability. This way, you can enable location support agents to resolve cases raised by other business location.

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Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Overview of inter-organization support

The Service Model Foundation enables business locations to request help from others and fulfill such requests. Besides supporting customers, business locations can also support other service organizations.

Currently, there's no easy way for agents who are assigned to a specific business location to access the details they need about other business locations they support, such as contact information, install base items, or existing cases.

With the inter-organization support capabilities, you can enable your business location agents to access additional details about the other business locations they serve, facilitating quicker and more efficient support for the requesting service organization.

Note: You can activate this capability by enabling the business location (com.snc.business_location) plugin.

Use case

Streamlined support for national retail chains: In the retail segment, store and central support teams assist with day-to-day store operations at the market, country, or segment level. The retailers aim to structure these teams to support only the stores or franchises within their countries. For effective customer support, store agents need full access to the stores, but currently, regional support agents lack full access to the service organizations, limiting their effectiveness.

For example, a retail chain operates with more than 150 stores nationwide. Each store has its own dedicated support team for daily operations, while regional support teams provide additional assistance. However, the regional location support agents currently lack full access to the service organizations, resulting in delays and inefficiencies in addressing store issues.

With the inter-organization capability, ABC retail can:

- Set up inter-organization support for their stores by associating each store with its regional service organization.
- Enable regional location support agents to view context about the stores they support, including contact information, install base, and existing cases.

This way, the regional support agents can quickly access necessary information and other details, coordinate efficiently with store agents, and resolve issues more effectively. This improves overall store performance and customer satisfaction.

Key benefits

Inter-organization support offers the following benefits:

- Improve agent experience: Provide agents at a business location with visibility into the other business locations that they support.
- Reduce resolution time: Minimize back-and-forth communication by providing key context alongside cases for service organizations.
- Increase operational efficiency: Define support structures for service organizations through hierarchy or relationship-based criteria.

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Configuring business organizations serviced by a business organization

You can track the relationship between requesting and fulfilling service organizations. You can set hierarchy or relationship-based support criteria for your business organizations (formerly business locations).

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Configuration tasks for setting up business organizations serviced by a business organization

Task	Description
Define the configuration type for customers or business locations	Define the configuration type for the business organization served to provide access to the location support agents.
Associate customers or business organizations to a service organization	Associate business organizations to service organizations using the organization customer criteria [service_organization_customer_criteria] table.

Define the configuration type for customers or business locations

Define the configuration type to provide service to customers or business organizations within any service organization (SO) using the Customer Service Management (CSM) application.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Business Organizations** > **Internal or External Business Organizations**.
2. Select the desired internal or external Organization record and go to the **Configurations** tab.
3. Select the configuration type based on whether you intend to provide service to customers or business organizations within any service organization.

Configuration type	Description
Customers served	Customers that are served at a business or ganization. The customers served can be de fined with two options: ○ **All customers**: Enables service organiza tion staff to create and resolve issues for all the customers. ○ **Criteria-based**: Enables service organiza tion staff to create and resolve issues only for customers associated with the service organization using a criteria.

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Configuration type	Description
Business locations served	Internal or external organizations that are served by a business organization. The business organizations served can be defined with three options: ○ **None**: Exclude support for any other business organization. ○ **Hierarchy-based**: Enables location support agents to create and resolve cases for service organizations through hierarchical relationships. In other words, it's a service organization relationship where a business location serves every business organization within its hierarchy. For example, regional support agents. ○ **Criteria-based**: Enables location support agents to create and resolve cases for service organizations that meet the defined criteria. For example, shared services.

4. **Optional:** If **Customers served** is set to **Criteria-based**, select the Restricted Customer Access check box in the Organization Customer Criteria form.

   (Optional) This setting controls which customer records staff members at this business organization can view. For more information, see Associate customers or business organizations to a service organization.

   Restricted Customer Access is available only when the business organization has an Organization Customer Criteria assigned to it. This check box is unchecked by default. Turning it on applies that same criteria to read access as well, only the accounts, consumers, households, that match the criteria are visible to staff at this business organization. Before this field existed, the criteria controlled only which customers staff could create cases, orders, quotes, and opportunities for, business organization staff could still see every customer record in the system.

   Note: This field controls visibility, not edit permissions. It doesn't change who can update a record, and it doesn't change how criteria themselves are created or edited.

5. Select **Update**.

What to do next

Once the configuration is defined, you can associate your customers or business locations to a service organization. For more information, see Associate customers or business organizations to a service organization.

Associate customers or business organizations to a service organization

Associate your customers or business organizations (formerly business locations) with a service organization (SO) using the Customer Service Management (CSM) application. By linking customers or business organizations (formerly business locations) to the service organization, staff can create or resolve cases for customers and locations raised by other business organizations.

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Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

About this task

You can associate customers (accounts, consumers, and households) and business organizations (both internal and external) by using the organization criteria [service_organization_criteria] table. This association helps your organization to gain access to all customers and business organizations associated with an service organization.

For more information about defining organization criteria, see Create the criteria for a service organization.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Business Organizations** > **Internal or External Organizations**.
2. Select the desired internal or external organizations (formerly internal or external business locations) record.
3. From the Organization Customer Criteria (formerly Service Organization Customer Criterias) related list, select **New**.
4. On the form, fill in the fields.

Organization Customer Criteria form

Field	Description
Organization Criteria	Criteria that define the customers at an organization (formerly service organization).
Organization	Organization that serves the customers that match the criteria.
Active	Check box to activate or deactivate the organization customer criteria. By default, the active field is set to **True**. **Note:** Only one active criterion is enabled according to table to be associated with a service organization .
Restricted Customer Access	When selected, only the accounts, consumers, and households that match this criteria are visible to the organization staff at a business organization. The check box is unchecked by default. Before this field existed, the criteria controlled only which customers staff

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Field	Description
	could create cases, orders, quotes, and opportunities for staff could still see every customer record in the system. **Note:** ○ This check box is available only when the **Customers served** field is set to Criteria-based in the Organization Customer Criteria form. In other words, Restricted Customer Access is available only when a business organization has an Organization Customer Criteria assigned to it. ○ This field controls visibility, not edit permissions. It doesn't change who can update a record, and it doesn't change how criteria themselves are created or edited.

5. Select **Submit**.

Result

An organization criterion is successfully defined for a business organization.

Tracking the customers serviced by a business organization

You can track the customers that are serviced by the business organization (formerly business location) in the Customer Service Management (CSM) application. Your organization can associate your customers, accounts, and households with business organizations and even create or resolve cases on the behalf of customers.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Configuration tasks for tracking the customers that are serviced by a business organization

Task	Description
Create the criteria for a service organization	Create the records for the organization criteria that define the list of matching customers to be associated with service organizations.
Define the configuration type for customers or business locations	Define the configuration type for the customers served to provide your service organization staff) with the access needed to help resolve cases.
Associate customers or business organizations to a service organization	Associate customers to service organizations through the organization customer criteria

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Configuration tasks for tracking the customers that are serviced by a business organization (continued)

Task	Description
	[service_organization_customer_criteria] table (formerly Service Organization Customer Criteria).

Create the criteria for a service organization

Define the criteria within organization criteria [service_organization_criteria] table so that you can later associate your service organizations to a service or your customers to a service organization. You do this task in the Customer Service Management (CSM) application.

Before you begin

Role required: admin

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Procedure

1. Navigate to **All** > **Customer Service** > **Service Organizations** > **Administration** > **Organization Criteria**.
2. Select **New**.
3. On the form, fill in the fields.

Organization Criteria form

Field	Data type	Description
Name	String	Name of the criteria.
Table	Table Name	Table where you must define the criteria. To establish customer associations, you must select **Account**, **Consumer**, or **Household** from the drop-down list in the **Table** field. Similarly, for associating products and services, you must choose **Internal Organization (formerly Internal Business Location)** from the drop-down list in the **Table** field. Selecting **Business Location** or **Service Organization** from the drop-down list in the

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Field	Data type	Description
		Table field leads to an error because the system currently doesn't support fulfillment capabilities for external organizations (formerly external business locations) when resolving a case. **Note:** Support can be extended to other tables by configuring them in the `SOCriteriaTableScript` script include.
Criteria	Conditions	Condition or query filter that matches a list of records in the table.

4. Select **Submit**.

Create relationships

Use relationships to provide internal and external users with additional access to customer data.

Before you begin

Role required: admin

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

About this task

With the Service Model Foundation feature, you can create relationships between the following users:

- Between an internal user and an account, household, or consumer.
- Between two consumers.

Relationships are based on responsibility definitions. These definitions describe a role or a function that supports a customer. When you create a relationship, you select the users involved in the relationship and the responsibility that one user performs on behalf of another.

The Service Model Foundation plugins provide:

- Relationships that you can create between users.
- Responsibility definitions that you can assign to a user in a relationship.

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Responsibility and relationship description

Responsibility	Used in relationship	Description
Account Manager	Account Team Member	Use the Account Manager responsibility to create a relationship between an internal user and an account. With this relationship, the internal user can: • Create and manage cases for their accounts. • View account information, including the related entities for an account. • Create and manage contacts and additional addresses for their accounts.

Relationship Manager	• Consumer Team Member
	• Household Team Member
		Use the Relationship Manager responsibility to create a relationship between:
		• An internal user and a consumer.
		• An internal user and a household.
		
		With this relationship, the internal user can do the following:
		• For a consumer:
		  ○ Create and manage cases for the consumer.
		  ○ View household information, including the related entities for that consumer.
		• For a household:
		  ○ Create and manage cases for the household.
		  ○ View household information, including the related entities for that household.
		  ○ Create and manage household members.

Authorized Representative	• Consumer to Consumer Relationship
	• Household Member Relationship
		Use the Authorized Representative responsibility to create a relationship between two consumers, regardless of household, or between two consumers within the same household.
		
		With this relationship, a consumer can:
		• Create and manage cases for another consumer.
		• View the information of another consumer.
		• View the install base information of another consumer and create cases for:
		  ○ Sold products
		  ○ Install base items

Procedure

1. Navigate to **All** > **Customer Service** > **Customer Relationships**.
2. Select the desired relationship.

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Option	Description
Account Team Members	Create a relationship between an internal user and an account.
Consumer Team Members	Create a relationship between an internal user and a consumer.
Household Team Members	Create a relationship between an internal user and a household.
Consumer Relationships	Create a relationship between two con sumers, regardless of household.
Household Relationships	Create a relationship between two con sumers within a household.

3. From the selected relationship list, select **New**.
4. Fill in the following fields for the selected relationship.

Relationship list form descriptions

Form	Fields
Account Team Member	○ **Account**: Select the account to which the internal user is assigned. ○ **Responsibility**: Select the **Account Manager** responsibility. ○ **User**: Select the internal user to fulfill the responsibility. ○ **Type**: Select the type from the list of related party configurations. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.
Consumer Team Member	○ **Consumer**: Select the consumer to which the internal user is assigned. ○ **Responsibility**: Select the **Relationship Manager** responsibility. ○ **User**: Select the internal user to fulfill the responsibility. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.
Household Team Member	○ **Household**: Select the household to which the internal user is assigned. ○ **Responsibility**: Select the **Relationship Manager** responsibility.

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Form	Fields
	○ **User**: Select the internal user to fulfill the responsibility. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.
Consumer to Consumer Relationship	○ **Consumer is**: Select the consumer to fulfill the responsibility on behalf of another consumer. ○ **Responsibility**: Select the **Authorized Representative** responsibility. ○ **of Consumer**: Select the consumer who is being represented by the consumer in the **Consumer is** field.
Household Member Relationship	○ **Household**: Select the desired household. ○ **Consumer is**: Select the consumer in the household to fulfill the responsibility on behalf of another consumer within the same household. ○ **Responsibility**: Select the **Authorized Representative** responsibility. ○ **of Consumer**: Select the consumer who is being represented by the consumer in the **Consumer is** field. ○ **Type**: Select the type from the list of related party configurations. ○ **Order**: Select the order that specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   The relationship is added to the relationship list.

   Account, Consumer, and Household Team Member relationships are also added to the corresponding related lists on the Business Organization (formerly Business Location) form.

   - Account Staff Relationships
   - Consumer Staff Relationships
   - Household Staff Relationships

   Consumer to Consumer and Household Member relationships are added to the following related lists:

   - Household form > Member Relationships
   - Consumer form > Consumer Relationships

Related topics

Service Model Foundation responsibilities

Create a responsibility definition

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Household-member relationship for an install base item

Your customer service managers can set up a household-member relationship among the members of one household by using the Customer Service Management application. The established relationship between the consumers in that household means that only the household members can access the install base items.

The household relationship can be used to assign responsibilities between two consumers within the same household with the Household Member Relationship table [sn_customer_rel_household_member_relationship]. This relationship gives household members additional access to edit and update an install base item. To learn more about how to create a household relationship, see Create a relationship between household members.

Setting up a household-member relationship limits the access to the household members. Only the household members can access the household install bases.

After a household-member relationship is established between two consumers, the consumer with the authorized representative responsibility gains access to all household install bases. This access applies only when the primary consumer is the other member in the established relationship.

Note: The authorized representative gains access to the household install bases of the consumer that belongs to the same household.

Related topics

Create relationships

Create related party configurations

Consumer relationship for an install base item

Your customer service managers can set up a relationship between two consumers, even if the consumers belong to different households. This relationship can be set up with the Customer Service Management application. An authorized representative can access all the consumer install base items that don't belong to any particular household.

A relationship can be established between two consumers by using the Consumer relationship table [sn_customer_rel_consumer_to_consumer]. To create a relationship, see Create a relationship between two consumers.

Authorized contacts, consumers, accounts, and members all have the Authorized Representative responsibility and can access all the details associated with an install base item. For information on authorized roles and responsibilities, see Create related party configurations.

After a relationship is created, all the install base items with a consumer-to-consumer relationship are visible to the consumer on the Consumer Service Portal. This relationship between the two consumers restricts all access to the household install base items to only those two consumers. This relationship also gives consumers additional access to edit and update the information that is related to an install base item.

Related topics

Create related party configurations

Configure customer data models for B2B2C

Enable business customers to support their end consumers by creating cases and tracking services for products and offerings, using the business-to-business-to-consumer (B2B2C) data model.

Role required: admin

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The business-to-business (B2B) model supports customer accounts and the contacts within those accounts. The business-to-consumer (B2C) model supports individual consumers.

With the business-to-business-to-consumer (B2B2C) model, you can support business customers and third-party channel partners who, in turn, support the end consumers. This model can be used to support:

- Employees of a business customer.
- End consumers of a business customer.

Related topics

Customer service business models

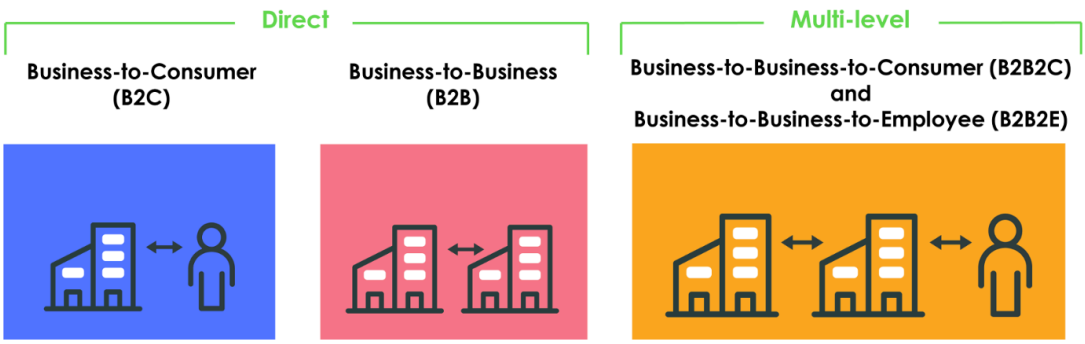
Customer service business models

The Customer Service Management (CSM) application provides different business models that you can use to support your business needs. Select a business model based on the type of services and support that you provide to your customers.

Understanding business models in the customer data model

To implement the Customer Service Management application successfully, the technical teams within your organization must distinguish between the different business models being serviced. Each model defines how customer data and relationships are structured. The CSM application provides the flexibility to adopt multiple models through its customer data model, including B2C, B2B, B2B2B, B2B2C, and B2B2E.

Overview of business models



Business-to-consumer (B2C) model

In a business-to-consumer (B2C) model, an organization sells products or services directly to individual consumers. Agents interact with these consumers to provide support whenever they experience an issue or request assistance.

For example, Sam Collins, a consumer, experiences performance issues with their streaming service. Sam can reach out for support through the Customer Service Portal between 08:00 and 20:00 or by calling the support line. An agent reviews the issue, updates Sam on the status of the case, and communicates progress through the web, email, or phone until the problem is resolved.

Business-to-business (B2B) model

In a business-to-business (B2B) model, products, or services are sold to another organization, which becomes the business customer. The customer organization is captured as an account, while its employees—who raise issues or seek help—are recorded as contacts. The B2B model

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enables you to manage accounts, contacts, customer relationships, and account teams effectively within your customer base.

For example, Shark Hotels, a customer of Calico, reports that its streaming service is unavailable, leading to multiple guest complaints. Employees at Shark Hotels, captured as contacts, can request support 24×7 via the Customer Service Portal, email, or phone. An assigned agent manages the case and provides updates to the contact through their preferred communication channel.

Business-to-business-to-business (B2B2B) model

The business-to-business-to-business (B2B2B) model extends the traditional B2B structure by introducing an additional business layer. In this model, one organization sells products or services to another company, which in turn resells or provides them to other businesses.

For example, an original equipment manufacturer (OEM) sells vehicles to dealerships, which then sell or lease these vehicles to corporate fleets. The dealerships also manage extended warranties and support maintenance claims for their downstream business customers, creating a chain of service relationships.

Business-to-business-to-consumer (B2B2C) model

In a business-to-business-to-consumer (B2B2C) model, a service provider supports both partner organizations (the business customer) and end consumers who use the products or services. This approach combines the B2B relationship between the provider and the partner, and the B2C relationship between the partner and its consumers.

For example, an insurance company sells its policies through captive agencies. Agents working at these agencies assist clients with claim processing, policy renewals, and inquiries. The insurance company thus supports the agency (business) and the clients (consumers) who benefit from the services.

Business-to-Business-to-Employee (B2B2E)

The business-to-business-to-employee (B2B2E) model occurs when a company delivers products or services to another business (the B2B component), which then extends these offerings to its employees (the B2E component). The intermediary organizations may be involved in activities such as procurement, customization, implementation, support, and training for the corporate employees. In this case, Employees of the companies are modeled as consumers, and related to the account via account-consumer relationship.

For example, original equipment manufacturers (OEM) sell vehicles to corporations for employee use, or an insurance provider offers group insurance policies that cover both employees and their families. The organization purchasing the service acts as the business customer, while its employees represent the end consumers.

Service Model Foundation

The Service Model Foundation framework expands the business-to-business (B2B) and business-to-consumer (B2C) models and provides the flexibility and security needed to support:

- Business organizations with internal and external locations
- Households and consumers
- The relationships that exist between these entities

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Contributor users

The contributor user model provides unified customer support for internal and external customers. With this model, you can engage middle office teams to resolve customer issues and requests.

- Enable employees to request support for themselves and external customers.
- Enable service organizations to serve one another and external customers.
- Assign tasks to middle office agents who work on specific tasks that are required to resolve a case.

Customer data models for B2B2C

The customer data model for B2B2C supports complex business models with multi-level customer relationships. This model can be used to support employees of a business customer or end consumers of a business customer.

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.

Overview of data models

Organizations have complex business models with multi-level relationships. These complex structures often exist between an organization and the end consumers. In the B2B model, while organizations do business directly with other organizations (business customers), the users of the service provided can be different. A user can be a direct customer (B2C), or a business customers' customer (B2B2C), or a business customer's employee (B2B2E).

With the business-to-business-to-consumer (B2B2C) model, you can support business customers and third-party channel partners who, in turn, support the end consumers. This model can be used to support:

- Employees of a business customer.
- End consumers of a business customer.

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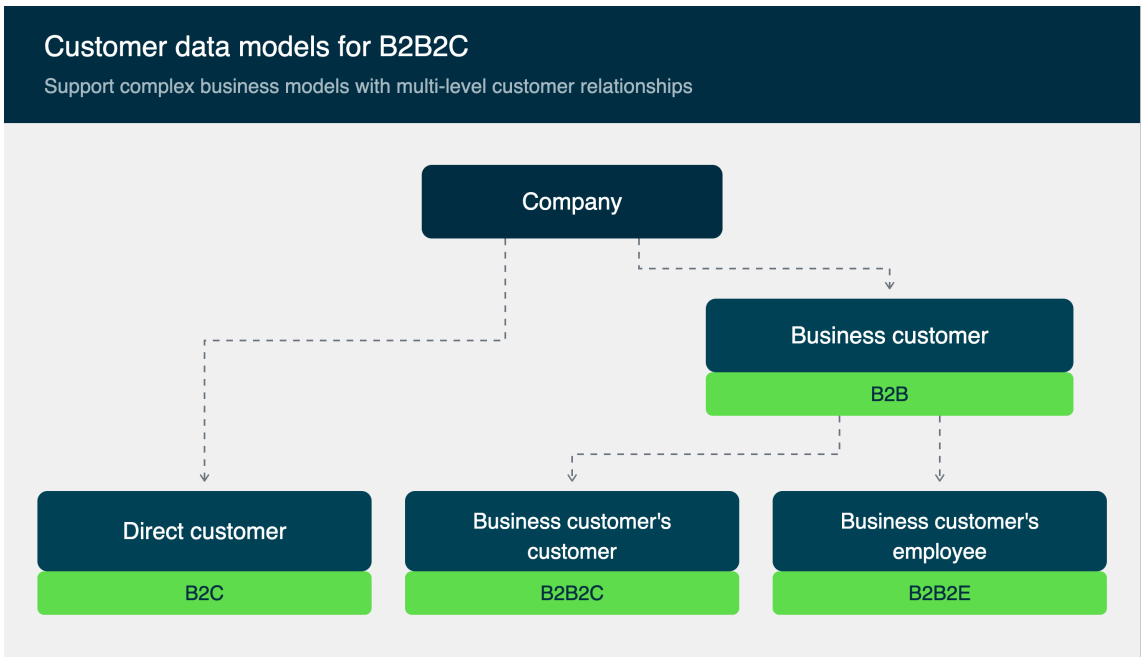
B2B2C data model



The business-to-business-to-consumer (B2B2C) data model supports different multi-level relationships between a company and the following types of customers:

- Direct customer: B2C
- Business customer: B2B
  - Business customer's customer: B2B2C
  - Business customer's employee: B2B2E

For details on the advantages of using the B2B2C data model application, see the text that follows in the Benefits section.

Benefits

- Enable service providers to manage all interactions and cases when the end consumer needs customer service.
- Enable service provider to have a complete view of the end consumers where they hold the relationship as direct customers (B2C) or through a business customer (B2B2C).
- Reduce costs by enabling self-service for various relationships (B2C, B2B2C, B2B2E).

To get started with this application, see Configure customer data models for B2B2C.

To use this application, see Using Customer Data Models for B2B2C.

Activate customer data models for B2B2C

Activate the customer data models for the CRM B2B2C Entities plugin (com.sn_csm_b2b_consumers) if you have the admin role. If they aren't already installed, the application includes demo data and installs related ServiceNow® Store applications and plugins.

Before you begin
Role required: admin

You must activate the Customer Service Install Base Management (com.snc.install_base) plugin before installing CRM B2B2C Entities.

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The CRM B2B2C Entities plugin provides the following roles:

- Account consumer (sn_acct_consumer.consumer)
- Account consumer agent (sn_acct_consumer.agent)

When the plugin is activated, customer service agents inherit the account consumer agent role. Consumers who are added as account consumers are given as the account consumer role.

About this task

The following items are installed with CRM B2B2C Entities:

- Business rules: Required account or consumer
- UI policies
  - Table: Case
  - Table: Interaction
  - Table: Sold Product
  - Table: Install Base Items
- Reference qualifiers
  - Table: Case
  - Table: Interaction
  - Table: Sold Produce
  - Table: Install Base Items

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the CRM B2B2C Entities plugin (com.sn_csm_b2b_consumers) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Configure the Account and Consumer forms for B2B2C

Enable account consumers to view the Account Consumers related list for the Case and Workspace views.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** and select an account.
2. Add the **Account Consumer>Account** related list to the Account form for the Case and Workspace views.
   a. Select **View** > **Case** from the Additional actions menu ⋮.
   b. Select **Configure** > **Related Lists** from the Additional actions menu ⋮.
   c. Select **Account Consumer>Account** in the **Available** column and move it to the **Selected** column.
   d. Select **Save**.
   e. Select **View** > **Workspace** from the Additional actions menu ⋮.
   f. Repeat steps 2b–2d.
3. Navigate to **Customer Service** > **Consumers** and select a consumer.
4. Add the **Account Consumer>Account** related list to the Consumer form for the Case and Workspace views.
   a. Select **View** > **Case** from the Additional actions menu ⋮.
   b. Select **Configure** > **Related Lists** from the Additional actions menu ⋮.
   c. Select **Account Consumer>Account** in the Available column and move it to the Selected column.
   d. Select **Save**.
   e. Select **View** > **Workspace** from the Additional actions menu ⋮.
   f. Repeat steps 4b–4d.

Configure the Install Base Items and Sold Products lists

Enable account consumers to view the **Account**, **Contact**, and **Consumer** fields for the Self-Service view.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Select **View** > **Self-Service** from the Additional Actions menu ⋮.
3. Select the gear icon (⚙).
4. Select the Account, Contact, and Consumer fields in the **Available** column and move them to the **Selected** column.
5. Select **OK**.
6. Navigate to **Customer Service** > **Products** > **Sold Products**.
7. Repeat steps 2–5.

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Configure the Case list for B2B2C

Enable account consumers to view the **Account**, **Contact**, and **Consumer** fields for the customer self-service view.

Before you begin

Role required: admin

Procedure

1. Navigate to **Customer Service** > **Cases** > **All**.
2. Select **View** > **Customer Self Service** from the Additional Actions menu ⋮.
3. Select the gear icon ( ).
4. Select the Account, Contact, and Consumer fields in the **Available** column and move them to the **Selected** column.
5. Select **OK**.

Customer Service Management and the CSDM guidelines

CSM enables you to provide service and support for your external customers through communication channels such as the web, email, chat, telephone, and social media. The goal of this use case is to understand how CSM key entities work with the core CSDM framework.

CSM use case

CSM provides proactive customer service, decreases cost of service, and provides end-to-end visibility to both customer service and service delivery groups. For more information, see Integrating with Service Portfolio Management.

For information on setting up the data, see Configure foundation data.

Results of the CSM use case

Understand the tables within the CSDM framework that are needed to support the following CSM functionality:

- Service-aware Install Base
- Proactive Customer Service Operations
- Real Time Service Health and Outage Tracking
- Contextual Service Catalog

The following sections include details of the activities needed for the use case.

See Applying CSDM guidelines to your product — product views for more information on Common Service Data Model use cases.

CSM data model

CSM uses the following key entities to resolve complex end-to-end issues.

- A **case** is the primary entity of CSM. CSM uses cases to track and resolve customer questions or issues.
- Customer information is linked to a case using associated entities such as Accounts, Contacts, Consumers, Household, Products, and Service Contracts. This information provides the customer service agent the information necessary to resolve customer issues.

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- An **account** can be a customer account, a partner account, or both.
- The **contact** is an employee of an account. A contact record stores information about a contact, such as the name, phone number, and email address. A contact can also have a user ID and can log in to the customer portal.
- A **consumer** is a customer in the business-to-consumer (B2C) business model.
- Household defines the consumers who constitute a household, and the relationships between household members.
- Sold Product tracks the products or services sold to an account or consumer.
- Install Base Items represent the instance of the product that has been configured for a customer.
- Service Contract defines the type of support that customers receive. A contract can include an account and contact or a consumer and the specific assets that are covered. A contract can also include multiple service entitlements and SLAs.
- Entitlement specifies the type of support that a customer receives as well as the supported communication channels.

Customer Service Management and CSDM tables

Customer Service Management manages and uses CSDM tables. Several ServiceNow products benefit from and add value to Customer Service Management.

CSM references the following CSDM tables:

1. Sold Product table [sn_install_base_sold_product in CSM

   Represents the product purchased by an Account or Consumer, and references the Product Model table [cmdb_model] or Service Model table [cmdb_service_product_model] for a Customer (Account or Consumer).

2. Install Base Item table [sn_install_base_item] in CSM

   Represents the products installed or in use by an account or consumer. Install Base Items are CIs consumed by the customer and generally reference the Application Services table [cmdb_ci_service_discovered] for SaaS products.

   Multiple sold products can be used on a given Install Base Item by using the Installed Products table [sn_install_base_m2m_installed_product].

3. A Service Model references the Service Offerings table [service_offering]. Multiple Service Offerings can be associated with a single Service Model.
4. After the product is sold to a customer, the Sold Product table references the Service Offering table [service_offering]. This reference helps to identify the customers subscribed to an offering.
5. Customers can request services related to the products they have purchased by linking the Catalog Items table [sc_cat_item] to the Product Model or Service Model by using the Product-to-Catalog Items Relationships table [sn_prod_cat_rel_m2m_product_catalog_item].
6. Account table [customer_account] in CSM

   Extends the Company table. The Account table can be a customer account, a partner account, or both.

7. Contact table [customer_contact] in CSM

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Extends the User table. A user is an employee of an account. A contact record stores information about a contact, such as the name, phone number, and email address. A contact can also have a user ID and can log in to the customer portal.

8. Consumer table [csm_consumer] in CSM

   A consumer is a customer in the business-to-consumer (B2C) business model.

CSDM tables used by CSM

1. Company [core_company], Business Unit [business_unit], Department [cmn_department], Location [cmn_location], Groups [sys_user_group], Users [sys_user]
2. Product Model tables [cmdb_model], and [cmdb_service_product_model]
3. Contract table [ast_contract]
4. Mapped service instance table (formerly application service) [cmdb_ci_service_discovered]
5. Configuration Item table [cmdb_ci_*]
6. Business Service table [cmdb_ci_service_business]
7. Business Service Offering table [service_offering]
8. Request Catalog table [sc_cat_item]

Products that add value to CSM

When you use CSM with other ServiceNow products, you increase the value you get from CSM. These other ServiceNow products include:

IT Service Management (ITSM)

Services have the context of the business, applications, information, and technologies layered beneath them.

Event Management

Enables organizations to identify service health-related issues on a single management console. Event Management provides alert aggregation and root cause analysis (RCA) for discovered services, application services, and automated alert groups.

Service Portfolio Management (Service Portfolio Management)

Enables organizations to document and manage services using a standardized, structured format.

Products that benefit from CSM

IT Service Management (ITSM)

Enables organizations to link incidents, problems, changes, and requests to cases, and have the context of the customer (consumer or account) reporting the issue.

IT Operations Management (ITOM)

Enables organizations to identify the Install Base Items and the customers affected by service issues. Helps organizations to provide proactive customer service.

Service Portfolio Management (Service Portfolio Management)

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Enables customers that have subscribed to the Service Offering to see who owns the service.

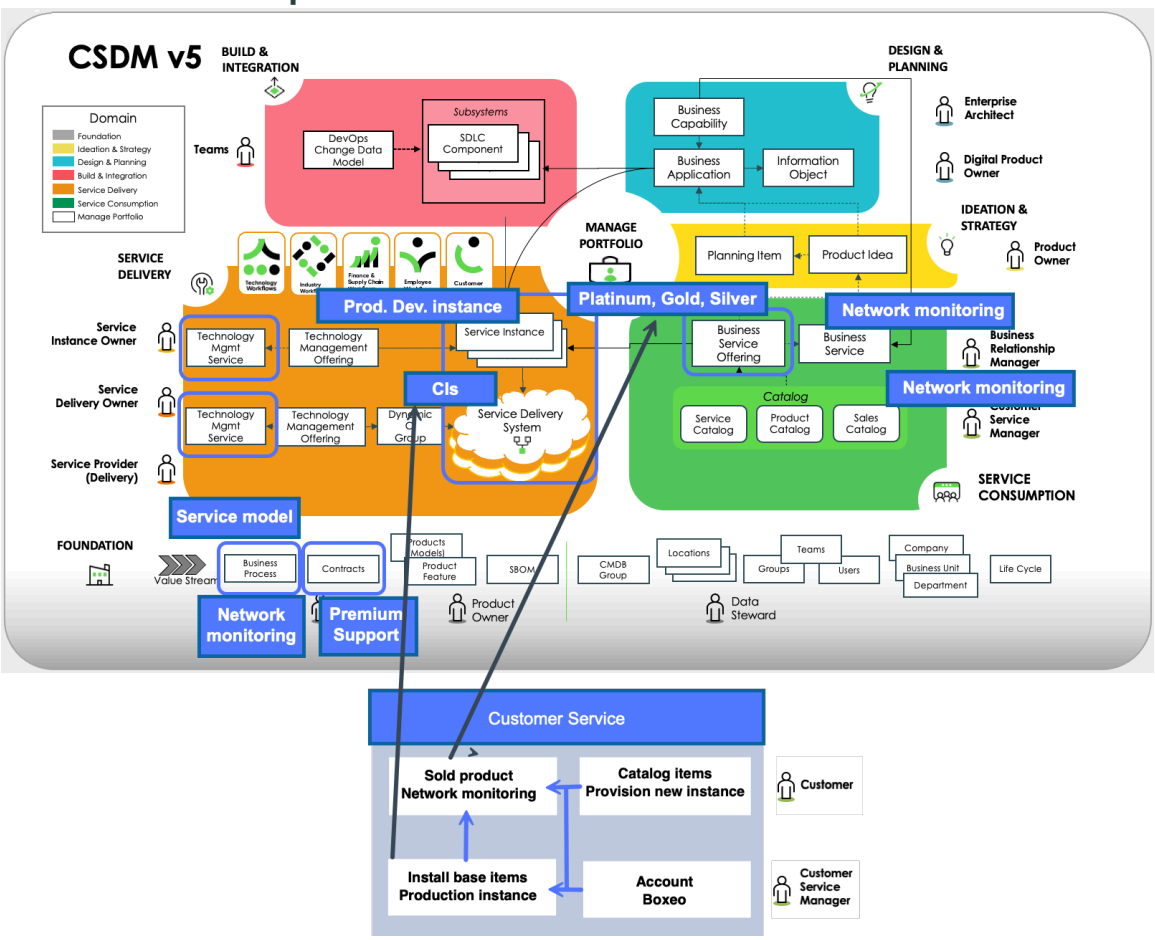
Customer Service Management examples

In this example, the CSDM helps the fictitious ACME technology company use CSM to manage network monitoring services for customers.

Example scenario: Key personas and how they benefit

ACME offers a network monitoring service to its enterprise customers who can purchase either the Platinum, Gold, or Silver offering. A customer, Boxeo, has purchased the network monitoring Platinum offering (Sold Product) and is using it in development and production environments (Install Base Item).

CSM data model example



The key personas (customer service agents, network operations center (NOC) engineers, service owners, and customers) can complete the following tasks:

Customer service agents can:

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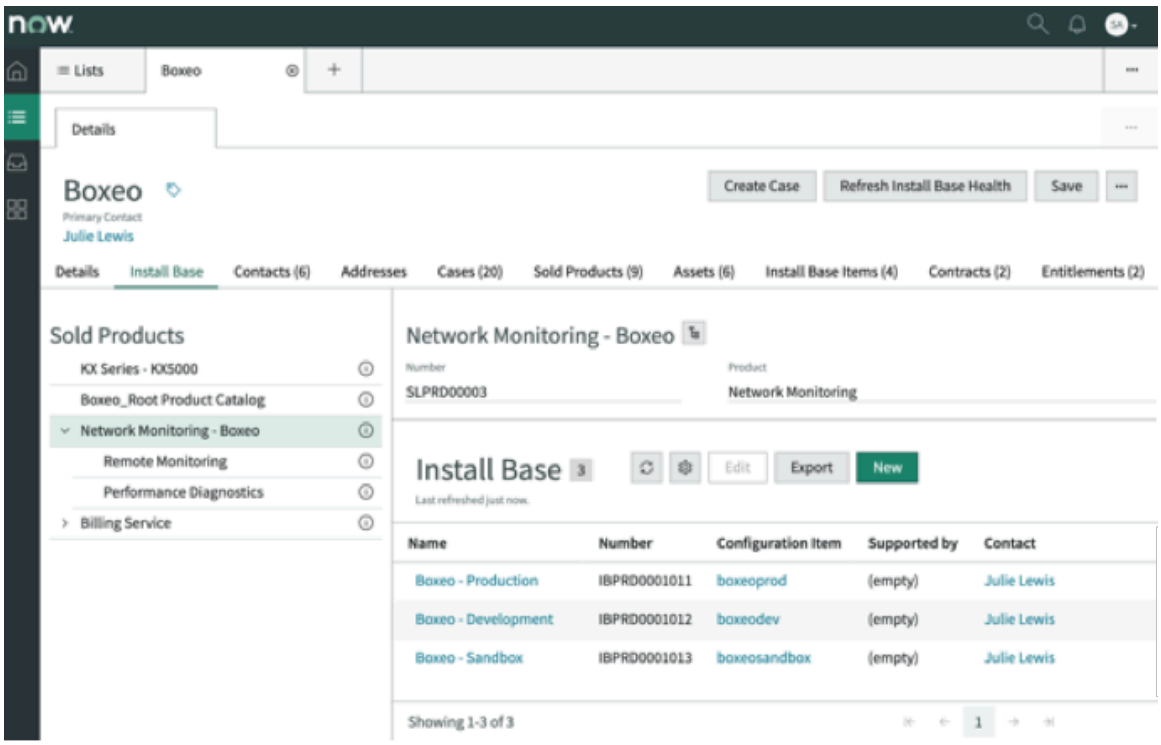
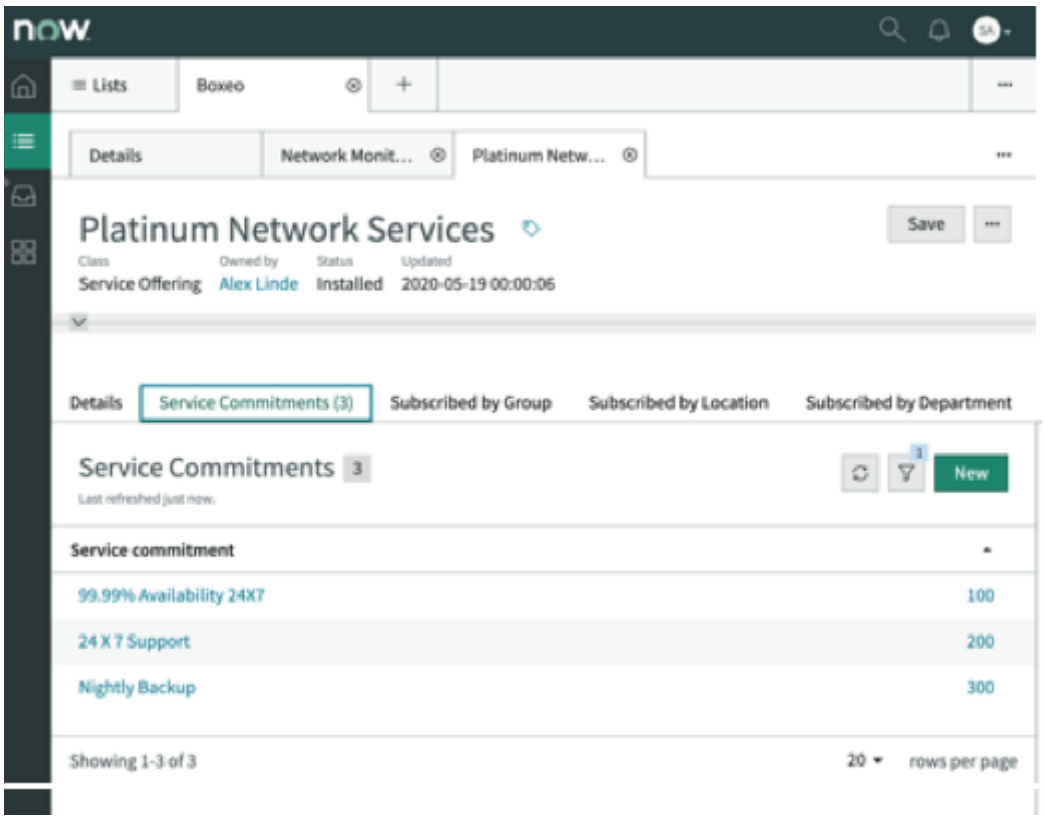
- View the products and services that the customer has purchased (Sold Product) and installed (Install Base).



- View the service offering associated with the sold product. The sold product references the service offering.



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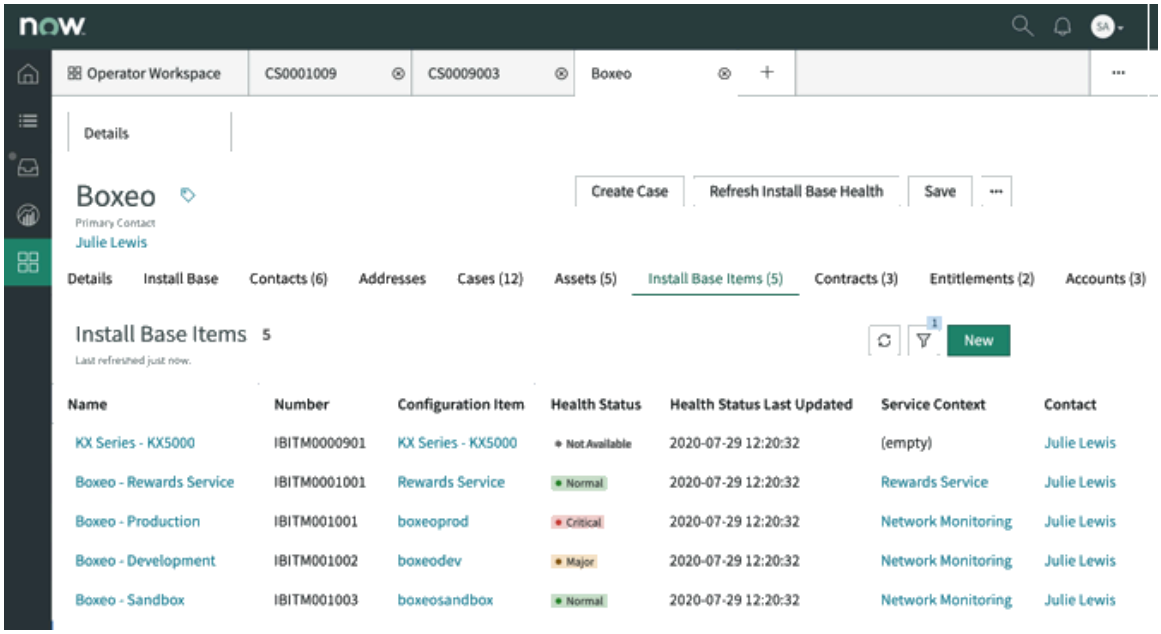
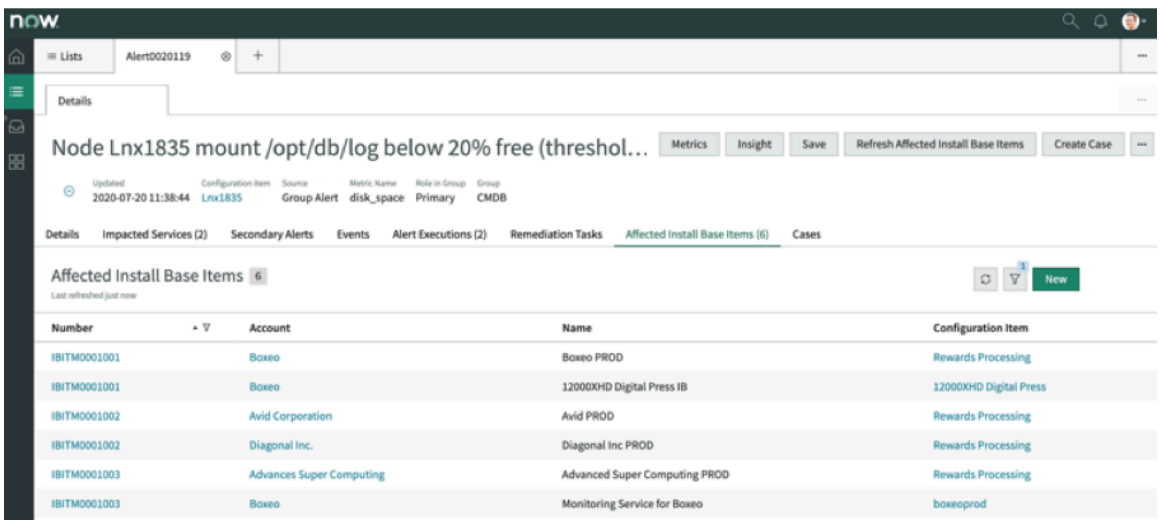
- View the health status of Install Base Items



NOC engineers can: View customers affected by a service issue and inform customer service. Specifically, they can perform the following operations:

- View the affected Install Base Items and add it to or remove it from an Account. The Install Base item references the application service (CI). The CI it depends on should be one of the CIs affected. The CI should also be referenced in the Alert to show that Install Base Item (and therefore the Account or Consumer) as affected.
- Create a proactive case from an alert and inform the customer service team of the service issue or outage.



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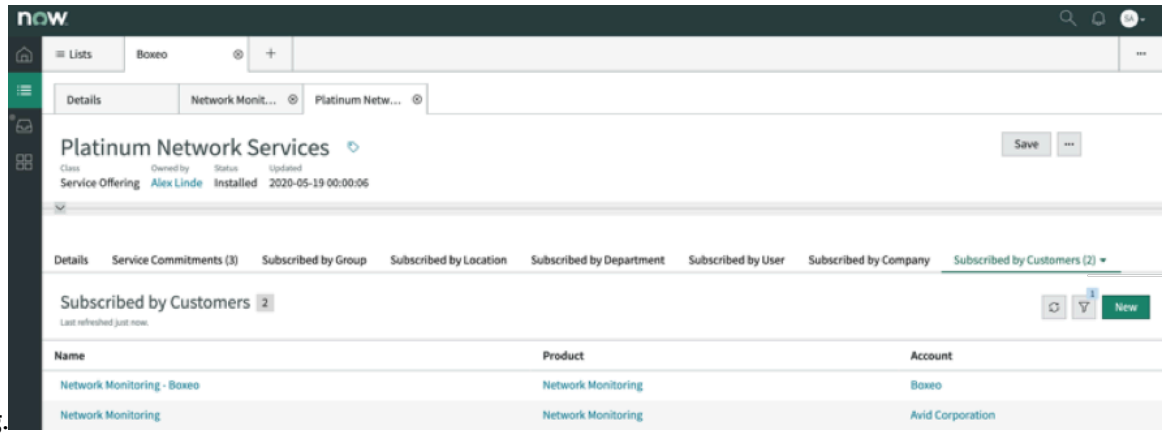
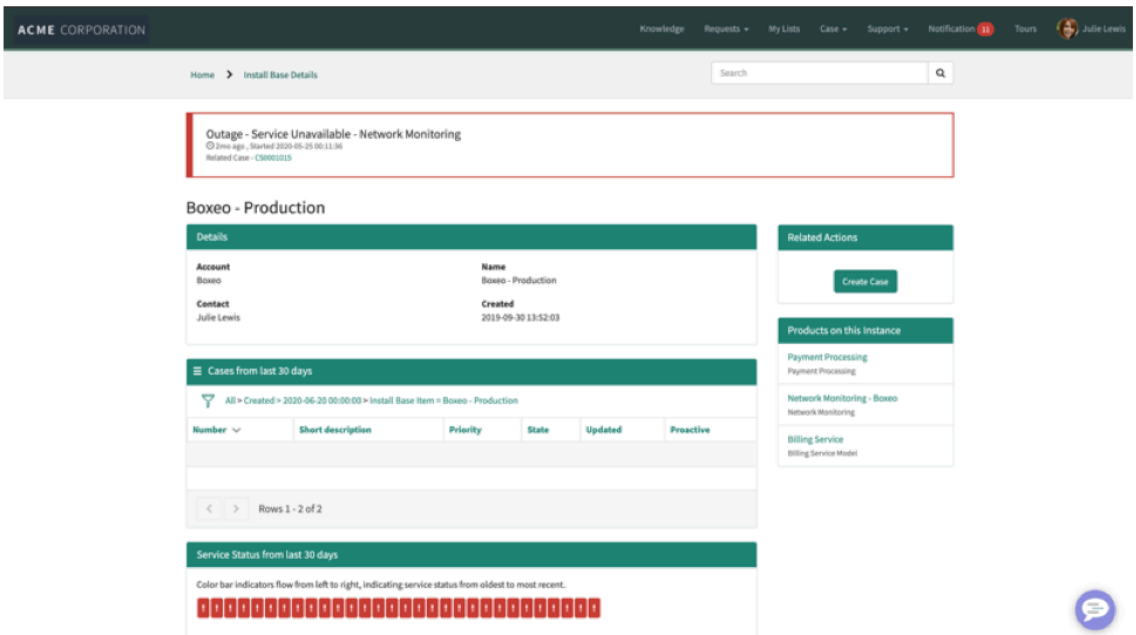
Service owners can: View the customers that are subscribed to a service offering.



Customers can:

- View the install base items and details.
- View outages and service issues.



- View products they have purchased.

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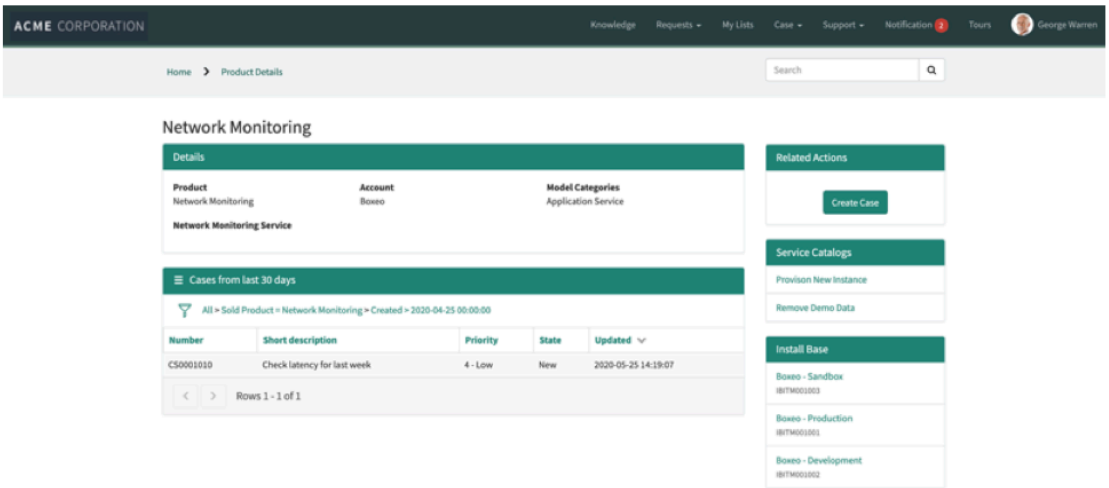
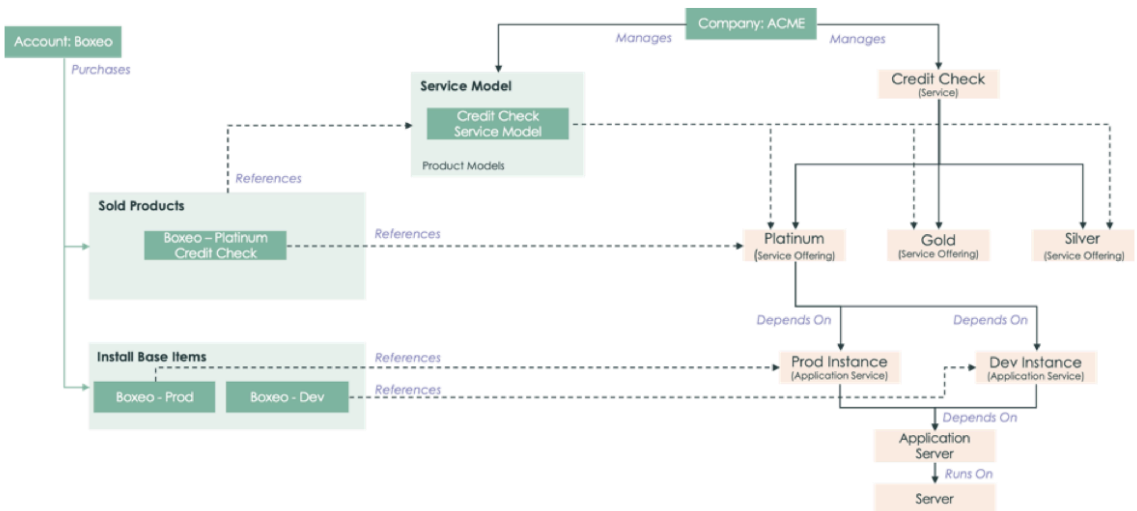
- Request services related to the products they've purchased.



Example CSM and CSDM use cases

Service with multiple packages

ACME offers a Credit Check Service to its enterprise customers. They can purchase the Platinum, Gold, or Silver offering.



Service with optional components

ACME offers a Billing Service to its enterprise customers. They can purchase the bundle or one or more of the component offerings (for example, invoices, payments, or discounts).

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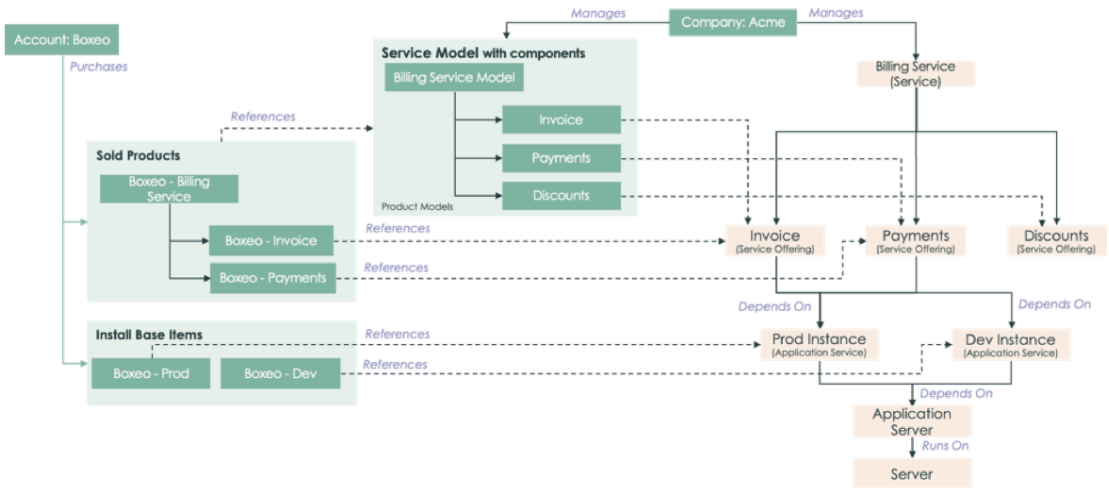
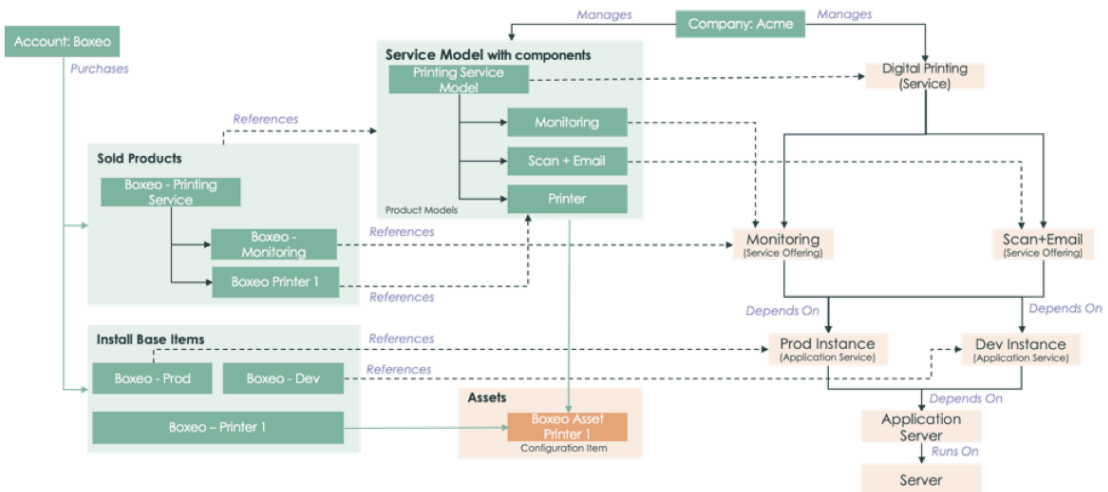


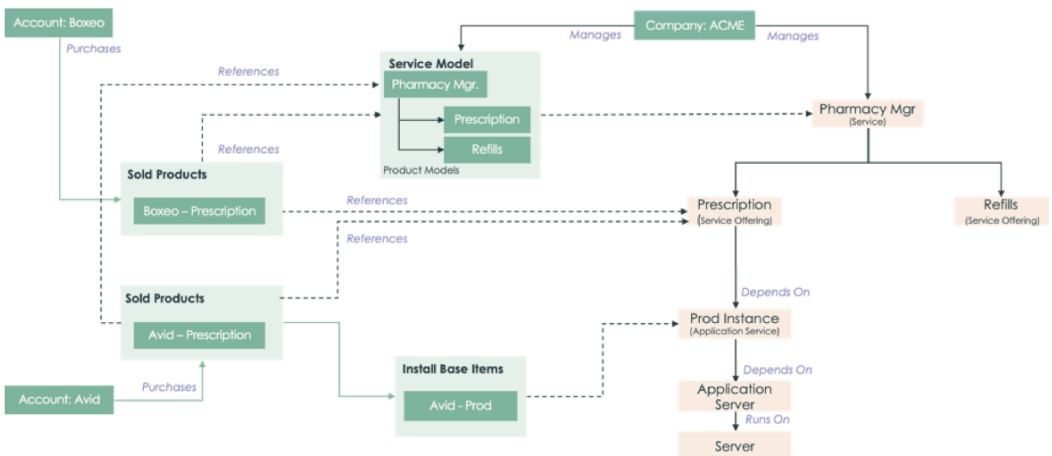
Service with a physical product

ACME offers a Digital Printing Solution. Customers can purchase either the bundle or the printer along with one more service offering (for example, Scan and Email Monitoring).



Service sold to multiple customers

ACME sells a Pharmacy Manager Service to two customers: Boxeo and Avid Inc.



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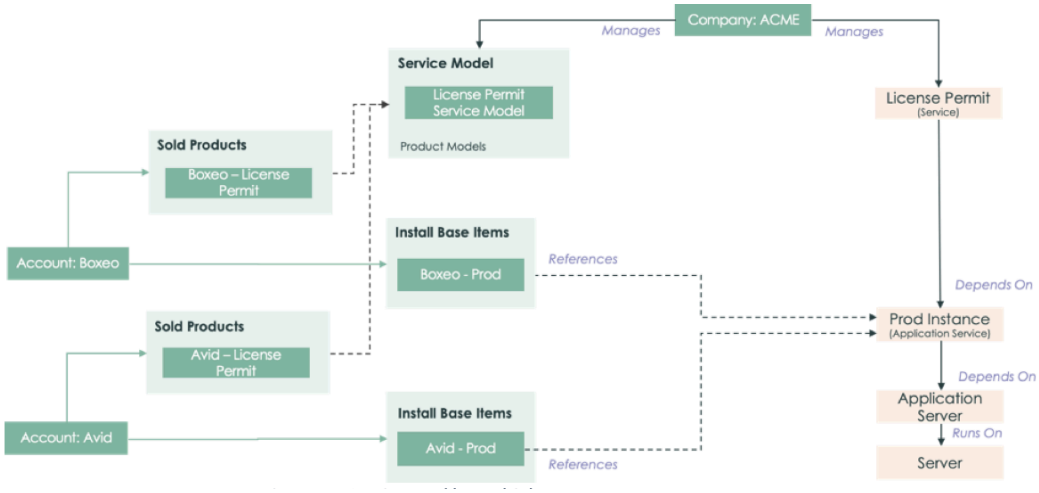
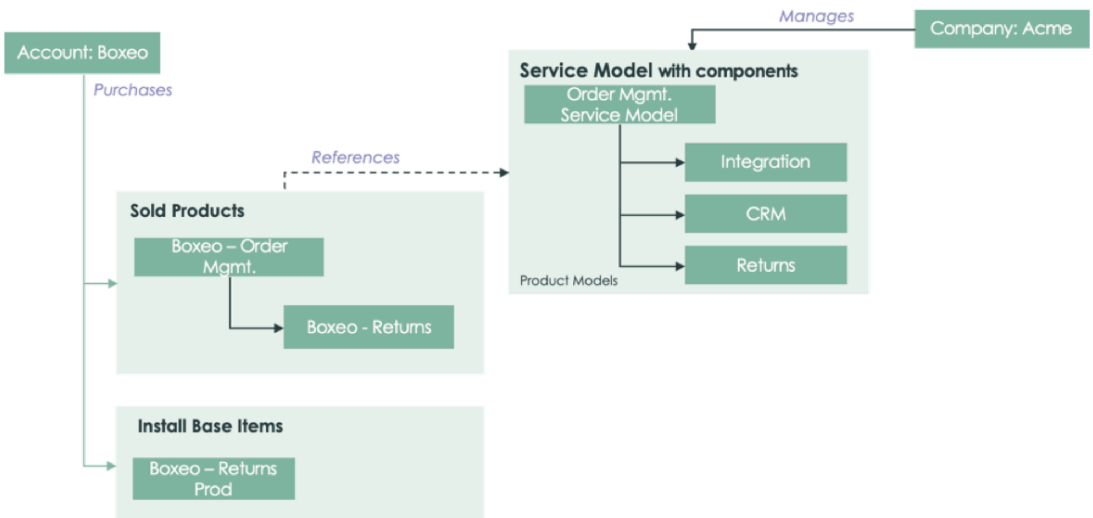
Service used by multiple customers

ACME deploys both Boxeo and Avid on the same production instance (multi-tenant model).



Service used on-premises

ACME offers an Order Management service. This purchase is tracked in the ServiceNow AI Platform but is used on-premises.



Additional information

For more information about the relevant CSM features and tasks, see the following topics:

Configure form views for Service Portfolio Management integration

View product information from the Customer Service Portal

Create a proactive case from an alert

Create a case for install base from the Customer Service homepage

Proactive Customer Service Operations

Service health status for install base

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Configure install base

Outage tracking for install base

View install base information from the Customer Service Portal

View install base information in Agent Workspace

View product information from the Customer Service Portal

View sold product information in Agent Workspace

Customer Service Management considerations

Consider these points while implementing the CSDM framework.

Considerations

- What is a Service-aware Install Base?

  A Service-aware Install Base enables companies to track the digital products and services in use. A Service-aware Install Base also tracks the relationships of the products and services to dependent services and CIs that affect their health.

- What are Proactive Customer Service Operations?

  Proactive Customer Service Operations bring CSM and Event Management together to enable companies to proactively trigger case workflows and notify the affected customers.

- Do I must purchase CSM Professional package to use the Service-aware Install Base?

  No. The Service-aware Install Base is included in the CSM base system.

- Can multiple sold products reference the same service offering?

  Yes. Multiple sold products (that is, Service Models) purchased by different companies can reference the same service offering. For example, multiple customers can purchase the same SaaS offering with the same service commitments.

- Can multiple Install Base Items reference the same application service?

  Yes. Multiple Install Base Items (either for the same account or for different accounts) can reference the same application service. For example, a multi-tenant SaaS offering where multiple customers (each with their own Install Base Item) are used on the same production instance (application service).

- When do I create an incident rather than a proactive case from an alert?

  Typically, some companies create an incident so that their NOC engineers can resolving the issue. After they determine that the issue impacts multiple customers, they also proactively create a major case and related child cases (one for each impacted customer) to notify the affected customers. Thus, the alert, incident, and case are all linked.

  Updates made by the resolving teams to the incident status or additional comments are reflected in the case. The customer service teams use these updates to keep customers informed.

  To meet the customer notification time requirements of the SLAs, companies may also automate creating incidents and cases from the alert. In addition, companies can also create a proactive case from the alert while the issue is being resolved.

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- What is the difference between entitlements managed at the CSDM Service Offering and the CSM Contracts and Entitlements?

  Service Commitments in CSDM define the expected level of a service. A service offering consists of a set of service commitments which uniquely define the service offerings. For example, a service offering may include a service commitment to perform a data backup each night.

  Service contracts in CSM store information about the type of support that is provided to a customer. A contract can include an account or consumer, a contact, and the specific assets that are covered. A contract can also include multiple service entitlements and SLAs. An entitlement defines the type of support that a customer receives, as well as the supported communication channels. For example, a customer may sign a service contract to receive support from 6:00 a.m. to 9:00 p.m. on weekdays.

- How can I request additional services based on the product that I've purchased?

  The relationship between the product model and the catalog items enables you to use the customer portal to request additional services for the products you've purchased. Multiple catalog items can be associated with a product model.

- Do I need elements from all the CSDM domains to set up CSM?

  No. The approach mentioned in this use case is based on the recommended guidelines and assumes you are in the Run or Fly stage of the CSDM implementation. See Implementing the CSDM framework in stages for more information.

  When you're implementing CSM, start with the tables in the CSDM Foundation domain and the CSM Customer Service domain. Using these domains enables you to leverage the capabilities included in CSM.

  To enable the proactive customer service operations, use tables from the CSDM Manage Technical Services domain for monitoring the application services tied to the customers' install base. Using this domain enables you to leverage the CSM and ITOM integration.

  Service-centric organizations can leverage the tables from the CSDM Sell/Consume domain to connect the product model to the service offerings and then to sold product. These connections enable you to track the service portfolio and see a complete view of how customers are consuming services.

Organize agent workspaces

Configure agent workspaces and boost efficiency by optimizing interfaces, setting up case management and routing, and integrating tools for smooth case handling.

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Case management

Configure your case management tools to optimize case handling.

Case routing and assignment

Use Advanced Work Assignment (AWA) to automatically route cases to the appropriate customer service agents in CRM Workspace.

CRM Workspace

Set up the CRM Workspace to provide agents with the tools they need to answer customer questions and resolve issues efficiently.

Agent tools

Configure organizational tools for agents, including Customer Central, dynamic related records, mobile application, guided decisions, and playbooks.

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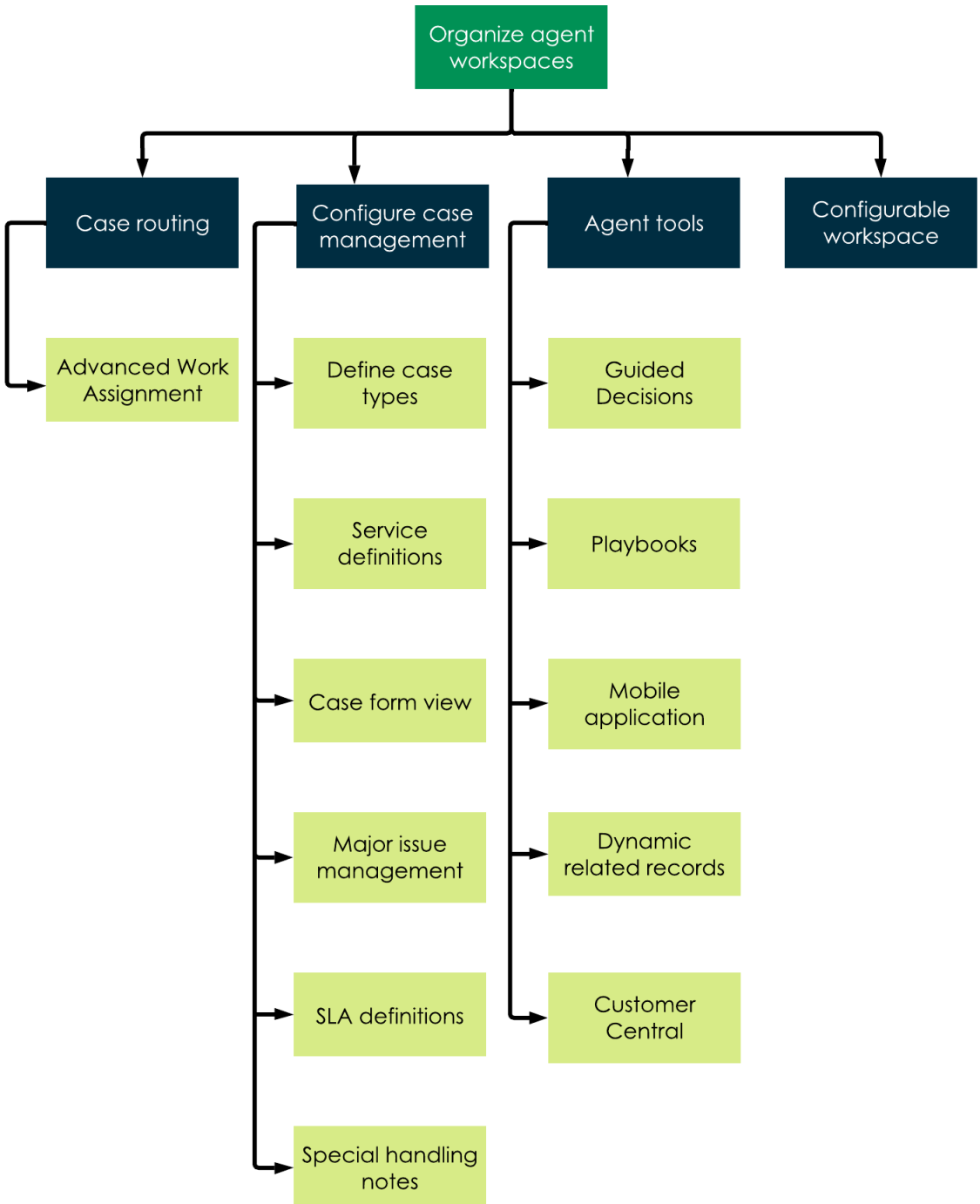
Agent workspaces overview



Case management

Configure your case management tools to manage cases efficiently by setting up features that permit you and your customers to create, resolve, and categorize cases. Define case types for different customer issues and configure service definitions to link products, services, and case types. This setup enhances case handling efficiency, improves customer satisfaction, and ensures accurate tracking and resolution.

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CRM Workspace

Set up the CRM Workspace and expand the workspace UI to optimize agent customer service processes. This user interface provides agents with the tools they need to answer customer questions and resolve issues efficiently.

Case routing and assignment

Set up Advanced Work Assignment in the CRM Workspace to route and assign cases automatically to the appropriate agents based on their availability, capacity, and skills. This setup helps to improve efficiency and response times.

Agent tools

Configure organizational tools for agents such as Customer Central, dynamic related records, mobile application, Guided Decisions, and playbooks. These tools enable agents to resolve cases quickly and efficiently.

Case management

Set up case management features to enable agents and customers to create cases as needed and work to resolve those cases. Create the necessary case types to handle specific types of customer issues. Configure service definitions to create connections between products, services, and case types.

Setting up case management, case types, and service definitions

Task	Description
Configure case management	Configure the case management features that enable agents and customers to create cases for issues and questions, track the activities related to resolving issues, and provide communication between the agent and customer. Some of the case management features include the following: • Configure a Case form view to display the desired fields and related lists. • Configure SLA definitions for customer service cases to specify the time within which service must be provided. • Major issue management overview to manage the communication and resolution process for issues that impact multiple customers. • Configure special handling notes to bring important case information to an agent's attention.
Customer service case types	Configure case types to handle different types of customer issues. When creating cases, agents can select the case type that corresponds to the customer issue.

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Setting up case management, case types, and service definitions (continued)

Task	Description
Service definitions	Configure service definitions that agents can use to create cases of the right type to support those service requests.

Configure case management

Configure the Customer Service Management features and components that agents and managers use to create and resolve cases.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

The customer service case is the primary entity of the customer service application. An agent creates a case to identify a customer's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track all of the communication to and from the customer, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the customer's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

Note: These steps may also apply to case type configuration.

To configure case management, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Case Management configuration tasks

Task	Description
Create the Case Form View	The Case form displays detailed information about a customer issue or problem. Create a Case form view to display the desired fields.
Create SLA Definitions	Customer Service Management uses service level agreements (SLAs) with customer service cases. An SLA can be attached to a service contract, to a company, and to a product and can be configured to start, pause, and stop based on any customer service case attributes.

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Task	Description
	After creating the necessary SLAs, associate them with customer service cases from the SLAs related list on the Case form.
Case Routing and Assignment	The case routing feature uses matching rules and assignment rules to identify cases that meet certain conditions and then route those cases to customer service agents. Create matching rules to identify cases and then create assignment rules to route cases to agents.
Assignment Workbench	The assignment workbench uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking. Managers can view these results and click one button to assign a task. To configure the assignment workbench: ○ Create matching criteria. ○ Create an assignment workbench configuration.
Special Handling Notes	Use special handling notes to bring important case information to an agent's attention. Create a configuration for the Case [sn_customerservice_case] table and then configure the form layout to display the notes in a pop-up window or a related list.
Escalation Management	Escalating a case or account raises awareness about important customer issues, facilitates communication, and enables users to track progress toward a resolution. Create escalation templates and severity definitions to control the escalation process.
Major Issue Management	Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, create cases for these customers, provide information, and manage the resolution process.
Case Action Status	The case action status feature enables customer service agents to easily identify cases that need attention and quickly prioritize their work. Visual indicators in the **Action Status** column on the case list highlight case status.
Auto Close Resolved Cases	Automatically close cases in the Resolved state if customers do not take any action.

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Task	Description
Case Digests	Case digests enable agents to proactively communicate with customers and internal stakeholders about cases. ○ Summaries: while a case is in progress, agents can send periodic case summaries that describe actions taken, next steps, and other case-related information. ○ Post case reviews: when the work on a case has been completed, agents can create a post case review that includes information such as the root cause, mitigation plan, and preventive actions.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Cases and case tasks

Customer service cases store information about customers, their questions and issues, and related information. Case tasks are created and assigned to users to complete the work necessary to resolve cases.

Cases

A case record is the main type of record used by the Customer Service Management application. Case records include detailed information about customers, their reported questions or issues, and the work performed to answer questions and resolve issues. The system stores case records in the Case [sn_customerservice_case] table.

Customer service agents create cases to identify questions or issues, gather information, and track the activities related to resolution. Agents also use cases to communicate with customers and other users.

Key features of a customer service case

Feature	Description
Case details	The Details tab includes the following information: • Customer information such as the customer's name, phone number, and email address. • Product information such as the products, assets, and services owned by the customer. • Case information, such as the priority, assignment group, and assigned agent. • Service contracts, entitlements, and associated service level agreements (SLAs).
Case activities	The Activity pane enables communication between:

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Key features of a customer service case (continued)

Feature	Description
	• Agents and customers. • Agents and other employees within the organization. The Activity pane also shows the communication history, case notes and updates, and attachments.
Related tasks	Related tasks include tasks that result from the case, such as case tasks, work orders, and requests. These tasks may be internal to the organization or they may involve the customer.
Information	Information that is gathered as part of resolving a case can be included in the knowledge base and used to help resolve similar cases. Agents can also search knowledge bases and attach useful articles.

For more information about cases and case records, see the following topics:

- Create a customer service case
- Create a customer service case of a specific type
- Customer service case form

Case tasks

Case tasks are created for additional work that must be completed as part of resolving a customer service case. These tasks are frequently assigned to users such as middle or back-office agents. Case tasks are stored in the Case Task [sn_customerservice_task] table.

Case tasks can be manually created from cases or automatically from case playbooks. When a case task is created, the system uses information from the case to automatically fill in some of the fields on the case task record. This includes the case number in the **Parent case** field. It also includes customer information in the **Account**, **Contact**, or **Consumer** fields, if this information is present in the case record.

Note: Case tasks can also be created from other records. If a task is created from a non-case record, such as an incident, problem, change, or request, the **Parent** field is updated with the number of the parent record. The **Account**, **Contact**, or **Consumer** fields aren't updated.

If the value in the **Parent case** or **Parent** fields is updated, the customer information in the **Account**, **Contact**, or **Consumer** fields is also updated.

Depending on a user's assigned roles, case tasks appear in a number of different Case Task list in the application navigator in CRM Workspace, including:

- My Case Task
- My Open
- Unassigned for my groups
- All
- My Contributing Tasks
- My Accessible Tasks

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For more information about case tasks and case task records, see the following topics:

- Create a task for a customer service case
- Case task form

Cases, case tasks and related parties

The Customer Service Management application enables you to support multiple contacts and consumers on cases and sold products and provide these contacts with varying levels of case access. These additional contacts and consumers are called related parties. Related parties are added to the Related Parties related list on the case record.

Customer service agents can also add related parties to case tasks. Customers that can be added to a case task are limited to the following:

- Customers that are related parties on the parent case.
- Customers that the agent has access to.

Users with the admin role can remove related parties from cases. When an admin attempts to remove a related party from a case, the system checks to see if that related party is associated with any open case tasks.

- If no, the related party is removed from the case.
- If yes, the related party isn't removed from the case and the system displays a message that lists the associated case tasks.

Case task integration with Service Definitions

The service definitions feature enables you to create connections between products, services, and case types.

- Agents can use configured service definitions to quickly create cases of the right type based on the selected product or service.
- Customers can use configured service definitions to quickly discover and request the services they need.

Case task integration with Service Definitions roles

Role	Description
Admin [admin]	When creating and updating case tasks, users with the admin role can select service definitions in the **Service definition** field on case task records.
Case task agent [case_task_agent]	• Contains the service definition viewer role (sn_csm_case_types.service_definition_viewer). This role gives users access to the service definitions that are mapped to case task tables. • Can create case tasks and update the **Service definition** field on the case task record.

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Case task integration with Service Definitions roles (continued)

Role	Description
Case task viewer [case_task_viewer]	• Contains the service definition viewer role (sn_csm_case_types.service_definition_viewer). • Can view case tasks and service definitions.

Case tasks and user roles

User roles and how they interact with case tasks

Role	Description
Admin role	
Admin [admin]	This user can: • Create and assign case tasks. • Update the **Account**, **Contact**, and **Consumer** fields after the case task is created. **Note:** The admin can change the values of these fields to one of the related parties associated with the parent case. • Delete case tasks.
Agent roles	
Customer service agent [sn_customerservice_agent]	This user can do the following for account cases: • Create and assign case tasks. • Update all case task fields. • Delete case tasks.
Consumer service agent [sn_customerservice.consumer_agent]	This user can do the following for consumer and household cases: • Create and assign case tasks. • Update all case task fields. • Delete case tasks.
Case task agent [sn_customerservice.case_task_agent]	This user can work on case tasks that they've created and that are assigned to them or to their assignment groups. Case task agents have read access to the **Account**, **Contact**, **Consumer**, and **Parent case** fields for case tasks that are assigned to them or to their assignment groups. This user can:

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User roles and how they interact with case tasks (continued)

Role	Description
	• View and update assigned tasks. • View and update created case tasks. • Create case tasks and assign those tasks to other users. • Add work notes, comments, and attachments to case tasks. • Update the status of case tasks. • Perform additional actions from case tasks such as sending email.
Relationship agent [sn_customerservice.relationship_agent]	This user can view, create, update, and delete case tasks for the customers they have relationships with.
Location agent [sn_customerservice.svc_location_agent]	This user can view, create, update, and delete case tasks for the business locations they have access to.
Consumer location agent [sn_customerservice.svc_location_consumer_agent]	This user can view, create, update, and delete case tasks for the business locations they have access to.
Outsourced agent [sn_csm_ocs.ext_agent]	This user can view, create, update, and delete case tasks based on the outsourcing criteria for the cases they have access to.
Account consumer [sn_acct_consumer.consumer]	Can view the **Account**, **Contact** and **Consumer** fields for the case tasks they have access to. A user with this role can work on the following case tasks: • Tasks that have been created by the user and tasks that are visible to them based on their access to the case. • Tasks that are assigned to the user or to the user's assignment groups. This user can: • View and update assigned tasks. • Create case tasks and assign those tasks to other users. • View and updated created case tasks. • Add work notes, comments, and attachments to case tasks. • Update the status of case tasks. • Perform additional actions from case tasks such as sending email. **Note:** Available with the Customer Data Models for B2B2C plugin (com.sn_csm_b2b_consumers).
Contributor roles	
Account contributor	This user can:

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User roles and how they interact with case tasks (continued)

Role	Description
[sn_customerservice.account_contributor]	• View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Consumer contributor[sn_customerservice.consumer_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Service organization contributor [sn_customerservice.service_organization_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record.
Self contributor [sn_customerservice.self_contributor]	This user can: • View and update case tasks and the fields on the case task record that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields on the case task record
Related parties roles	
Case authorized contact [sn_customerservice.case_authorized_contact]	This user can: • View and update case tasks and the fields that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields.
Case authorized consumer [sn_customerservice.case_authorized_consumer]	This user can: • View and update case tasks and the fields that they have access to. • View the **Parent case**, **Account**, **Contact** and **Consumer** fields.

Case tasks and external user roles

End users and requesters can access case tasks from the Customer and Consumer Service Portals by selecting **My Lists** > **My Case Tasks**.

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End users and requesters can view and update case tasks and the fields that they have access to (case tasks that have the **Visible to customer** field enabled). You get read access to the **Parent case**, **Account**, **Contact** and **Consumer** fields.

- sn_customerservice.customer
- sn_customerservice.consumer
- customer_case_manager
- sn_customerservice.partner
- sn_customerservice.consumer

The users can see the following fields on the Case Task lists and forms: **Account**, **Contact** and **Consumer**. If an end user is viewing a case task from a list of case tasks, the Case Task form also displays the **Parent case** field.

Scheduled job for case tasks

Case task enhancements in the Brazil release add several fields to the case task record. After upgrading to the Brazil release, you can run a scheduled job that populates these fields for active case tasks.

Note: It is recommended that you run the scheduled job during planned downtime.

If the parent case is an active record in the Case table (sn_customerservice_case) or a table that extends the Case table, the **Update case task fields** scheduled job does the following:

- Copies the parent case number to the **Parent case** field.
- Copies the account and contact or consumer information to the **Account** and **Contact** or **Consumer** fields, if this information is present in the case record.

To run this scheduled job:

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Select **Update case task fields** in the **Name** field.
3. Select **Execute Now**.

Related topics

Contributor user roles

Configure a Case form view

The Case form contains detailed information about a customer issue or problem. Configure a Case form view to display the desired fields and related lists.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **Create New**.
2. Configure the form layout to add the fields you require.
   For more information about adding fields to a form, see Configuring the form layout.

   Note: If you are using Customer Service Install Base Management and Proactive Customer Service Operations, add the **Sold Product** field.

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3. Configure the form layout to add the related lists you require.
   For more information about adding a related list to a form, see Configuring the form layout.

   Note: If you are using Customer Service Install Base Management and Proactive Customer Service Operations, add the **Affected Install Base Items** related list.

4. Click **Submit**.

Related topics

Create and delete views

Add the Internal User field to the Case form

Add the **Internal user** field to the Case form for the Case view and the Workspace view.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

The **Internal User** field displays the name of an internal user. When an agent is creating a case on behalf of someone else, they can use this field to identify the person requesting assistance. This user can be an internal employee asking for help for an account, consumer, or service organization, or for themselves.

With the Case Management Core plugin (com.sn_customerservice), agents can create cases for internal employees or on behalf of their accounts and consumers. Additional plugins provide additional functionality for the **Internal User** field. For more information, see Contributor users.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup** and click **Get Started**.
2. In the Case Management category, click **Get Started**.
3. Click **Add Internal User Field to the Case Form View**.
4. Add the **Internal user** field to the Case form for these views: Case and Workspace.

Related topics

Create and delete views

Configure SLA definitions for customer service cases

A service level agreement (SLA) specifies the time within which service must be provided. Configure SLA definitions that include the necessary information to create and progress SLAs for customer service cases.

Before you begin

Role required: admin

About this task

The Customer Service Management application uses service level agreements with customer service cases. An SLA can be attached to a service contract, to a company, and to a product and can be configured to start, pause, and stop based on any customer service case attributes.

An SLA is automatically associated to a case when the case is created or updated based on the conditions that have been set up in the SLA definition. The specific record that gets attached to a case is the Task SLA record, which tracks the SLAs for that particular case. The Task SLA table [task_sla] stores Task SLA records.

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Procedure

- For more information about SLAs, see Service Level Management concepts.
- To create an SLA, see Create an SLA definition.

Related topics

Service Level Management concepts

Routing and assigning customer service cases

The case routing feature uses matching rules and assignment rules to identify customer service cases that meet certain conditions and then route those cases to customer service agents.

Overview

Create one or more matching rules that establish specific conditions that a case must meet before it can be routed to an agent. Then use an assignment rule to route those cases to agents based on product knowledge and availability. You can also invoke the MatchingRuleProcessor API to execute the matching rules and return a list of users (sys_ids).

Matching Rules

Matching rules are based on two defined sets of conditions, one that identifies specific case attributes and another that identifies the agent resources best suited to handle cases with these attributes. Matching rules are created using the Matching Rule form.

To identify case attributes, select a table that stores the task type (for example, the Case table) and then use a condition builder to create one or more conditions that a case must meet before being routed. For example, you can build conditions for a specific account and product or for a specific product and priority level.

To identify an agent resource, use one of the following resource matching methods:

- **Simple**: Select the resource name from a list of users.
- **Advanced**: Build conditions that filter the available agent resources. These conditions can be based on user role, agent group, specific skills, work load, or agent availability.
- **Scripted**: Create a customized script to identify agent resources.

Another resource matching method, Selection Criteria, can be used to create a matching rule with selected matching criteria for use with the assignment workbench.

Assignment Rules

Use assignment rules to automatically assign task to users and groups. Create an assignment rule for a matching rule by selecting the **Create assignment rule** related link on the Matching Rule form. When the matching rule conditions are met, a case can be routed to a user or a group using the assignment rule. The assignment rule is applied only if the task isn't already assigned to another user or group.

Note: Matching rules and assignment rules are independent records with no synchronization. If you change the **Applies to** component of the matching rule, it isn't reflected in the assignment rule.

When you create an assignment rule, you select the following:

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- The table for the task type and the conditions that must be met before the task is assigned.
- The user or the group to which the task is assigned.

Alternately, you can create a script to further customize the assignment rule.

Related topics

Assignment rules module

Configure case routing and assignment

The case routing feature uses matching rules and assignment rules to identify cases that meet certain conditions and then route those cases to customer service agents.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Matching rules are based on two defined sets of conditions: one that identifies specific case attributes and another that identifies the agent resources best suited to handle cases with these attributes.

Assignment rules automatically assign tasks to users and groups when the conditions in a matching rule are met. Create an assignment rule for a matching rule using the **Create assignment rule** related link on the Matching Rule form.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Case Routing and Assignment

Task	Description
Create matching rules for case routing	Matching rules are based on two defined sets of conditions, one that identifies specific case attributes and another that identifies the agent resources best suited to handle cases with these attributes.
Create assignment rules for case routing	Assignment rules automatically assign tasks to users and groups when the conditions in a matching rule are met.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Routing and assigning customer service cases

Create a matching rule for case routing

Create a matching rule for a customer service case that identifies the case attributes as well as the agent resources.

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Before you begin

Role required: assignment_rule_admin

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Matching Rules**.
2. Click **New**.
3. Fill in the fields on the Matching Rule form.
   This form contains the following sections:
   - Basic rule information
   - Applies to: use this section to create rule conditions
   - Resource: use this section to create agent and agent group conditions

Matching Rule form

Field	Description
Name	The name of the matching rule.
Execution order	The order in which this matching rule is to be executed. Similar to business rules, matching rules are processed based on execution order, from the lowest to the highest.
Active	Enable this check box to activate the matching rule.
Applies To	
Table	The table that stores the task for which the matching rule is being created. The default is the Case [sn_customerservice_case] table.
Conditions	Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by clicking the **X** to the right of a condition.
Resource	

Matching	The type of resource matching method to use for this rule: Simple, Advanced, Scripted, Selection Criteria.
	
	Select **Simple** to assign a task to a specific user.
	a. Click the lookup icon next to the **Resource** field.
	b. Select a **Table name**.
	c. Select a **Document** from the table.
	d. Click **OK**.
	
	Select **Advanced** to create a specific set of resource conditions. Then use the condition builder in the **Resource** field to identify these conditions.
	
	Select **Scripted** to create a customized script for identifying resources, with the goal of returning a list of users that have the same skills as the task. The task under consideration is set in the context of the script. For example:
	
	`//current has the task record for which the rule is being executed.`
	`var task = current;`
	`var skills = task.getValue("skills");`

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Field	Description

	`var skillUtil = new global.SkillsUtils();`
	`var skilledUsers = skillUtil.getAllSkilledUserIds(skills);`
	`return skilledUsers;`

Resource	This field changes depending on the resource matching type selected in the **Matching** field. For **Simple** matching, use this field to select a table and a user. For **Advanced** matching, use the condition builder in this field to build one or more conditions to identify a resource. These conditions can be based on user role, agent group, specific skills, work load, or agent availability.
Schedule based filtering	This field applies to **Advanced** matching. Enable this check box to filter resources that are in schedule (work hours) at the time of routing.
Script	For **Scripted** matching. use this field to create a customized script for identifying resources. An example script is included. The expected return from a customized script is an array of resource sys_ids.

4. Click **Submit**.
   The rule appears in the Matching Rules list.
5. Open the newly created rule from the Matching Rules list and add the desired matching criteria.
6. From the **Select Criteria** related list, click **New**.
7. Select a **Criterion**.
8. In the **Use for** field, specify how you want the matching criterion to be used.

Option	Description
Ranking and display	Use the criterion to determine agent ranking and displays it in a column on the workbench.
Display only	Displays the criterion in a column on the work bench but does not use it to determine agent ranking.
Ranking only	Uses the criterion to determine agent ranking but does not display it on the workbench.

9. Select a **Ranking Method**.

Option	Description
More is better	For example, more availability is better when determining the agent ranking.
Less is better	For example, fewer assigned cases are better when determining agent ranking.

10. Click **Submit**.
    The criterion appears on the Matching Rule form in the **Select Criteria** related list.

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11. **Optional:** From the **Select Criteria** related list, set a **Threshold** for the criterion.
    A threshold sets a minimum requirement for a criterion. If necessary, personalize the list and add the **Threshold** field.

Reverse matching

Reverse matching uses the same matching rules to match tasks to a resource rather than resources to a task.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, and admin

About this task

The resource matching engine can match resources and tasks in two ways:

- Forward: matches resources for a task
- Reverse: matches tasks for a resource

The same matching rule can be used for both forward and reverse matching.

Procedure

- In the Customer Service Management application, you can use reverse matching to determine which call the next available agent should take.
- Reverse matching returns a list of case sys_ids instead of user sys_ids.
  When using reverse matching, you can also limit the cases returned to a specific set. The following example shows how to use reverse matching.

```
MatchingRuleProcessor.processAndGetCandidates(resource,
 taskLimit, "sn_customerservice_case", "reverse", false,
 [<array of cases to consider>])
```

Invoke the MatchingRuleProcessor API

After you create one or more matching rules, you can invoke the MatchingRuleProcessor API and run the rules.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, admin

Procedure

- You can invoke the matching engine using the *`processAndGetCandidates`* method of the *`matchingRuleProcessor`* class.
  Pass in the task record and the number of resources. The result is an array of resource sys_ids.
- The system processes the matching rules based on the number stored in the **Execution Order** field for each rule.
  The result is a list of users (sys_ids), which you can use for case routing and assignment.

Create an assignment rule for case routing

Create a rule that assigns those cases that meet the matching rule criteria to a customer service agent.

Before you begin

Role required: assignment_rule_admin

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Procedure

1. Open the desired matching rule.
2. Select the **Create assignment rule** related link.
   You can also create an assignment rule by navigating to **Routing and Assignment** > **Assignment Rule** and selecting **New**.
3. Fill in the fields on the Assignment Rule form.

Assignment Rule form

Field	Description
Name	The name of the assignment rule.
Application	The name of the application to which this assignment rule belongs. The default application is **Global**.
Order	The order in which this assignment rule is executed. Similar to business rules, assignment rules are processed based on execution order, from the lowest to the highest.
Active	Enable this check box to activate the matching rule. Only active assignment rules take effect.
Applies To	
Table	The table that stores the task for which the assignment rule is being created. This list shows only those tables and database views that are in the same scope as the assignment rule. If you select a custom table that extends the task table, you must clear the instance cache by navigating to `https://<instance_name>.service-now.com/cache.do` in order for the assignment rule to work. **Warning:** Clearing the system cache can affect overall performance, and degrade system response times. Don't run cache flushes during business hours, and don't trigger cache flushes automatically.
Conditions	The conditions in which the assignment rule will apply. Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by selecting the **X** to the right of a condition.
Assign To	
User	The user to be assigned to the task.
Group	The assignment group to be assigned to the task.
Script	
Script	A script to determine advanced assignment rule functionality. Scripts provide access to current.variable_pool variables.

4. Select **Update**.

Related topics

Define assignment rules

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Configure Skills Management

Manage skill data in a central location for customer service agents and work items.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

To configure skills management, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Skills Management category, view the list of tasks to configure the feature.

Skills Management configuration tasks

Task	Description
Manage skills	Organize skills data of agents and work items in a centralized location.
Assign skills to work items	Create rules to identify skills and automatically associate them with work items.
Assign skills to customer service agents	Identify skills each agent has to work on tasks and assign it to the agent.

Mandatory skills

Use the mandatory skills feature to identify any skills that are required for agents and technicians to work on customer service cases and field service work orders and tasks. Then assign cases and tasks to agents and technicians who have those required skills.

When assigning cases, work orders, and work order tasks, the assignment tools consider the mandatory skills, filter out agents and technicians who don't have these skills, and then rank the remaining agents.

- If agents with the mandatory skills are available, the cases and tasks are assigned to these agents.
- If agents with the mandatory skills aren't available, then agents with any other, non-mandatory skills identified in the cases and tasks are ranked and assigned.

Field service dispatchers (wm_dispatcher), field service technicians (wm_agent), customer service managers (sn_customerservice_manager), and customer service agents (sn_customerservice_agent) can specify both skills and mandatory skills for cases and tasks.

Mandatory skills are an optional feature. Mandatory skills can be identified on the assignment workbench. In addition to the **Skills** list, the assignment workbench includes a **Mandatory Skills Added** list. Agents are ranked in the workbench based on the number of skills that match the skills identified in the Skills list. If the mandatory skills feature is being used, then the agents displayed are filtered by the skills listed in the Mandatory Skills Added list and then ranked by the other matching criteria.

Related topics

Use the assignment workbench

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Configuring mandatory skills

Configure the mandatory skills feature for use with the Customer Service Management and Field Service Management applications.

Mandatory skills is an optional feature included with the Customer Service Management and Field Service Management plugins. Use the steps below to configure this feature with the desired application.

Customer Service Management configuration

To configure the mandatory skills feature for use with Customer Service Management:

- In the Case form:
  - Configure the form layout to use the Task Skills [task_m2m_skill] table.
  - In the Task Skills table, set the **Mandatory** field to **True** to identify skills that are mandatory to complete a task.

    Note: The Case form should use either the **Skills** field or the Task Skills table, but not both.

- [Optional] For existing cases that have data populated in the **Skills** field on the Case form, run the **Migrate Skills to Task Skill M2M** script to move this data to the Task Skills table. By default, this fix script migrates the skills from existing entries in the Case, Work Order, and Work Order Task tables to the Task Skills table. For more information, see Migrate skills to the Task Skill table.
- If you are using the assignment workbench, replace the **Matching Skills** matching criteria with the **Matching Skills - Mandatory Skills Support** matching criteria. For more information, see Matching rules for case assignment.

Field Service Management configuration

To configure the mandatory skills feature for use with Field Service Management:

1. Enable the `work.management.use.mandatory.skills` system property.
2. Configure the Work Order form and the Work Order Task form to use the Task Skills [task_m2m_skill] table.
3. [Optional] For existing work orders and tasks that have data populated in the **Skills** field on the Work Order and Work Order Task forms, run the **Migrate Skills to Task Skill M2M** script to move this data to the Task Skills table. By default, this fix script migrates the skills from existing entries in the Case, Work Order, and Work Order Task tables to the Task Skills table and configures them as optional skills. For more information, see Migrate skills to the Task Skill table.
4. If you are using dynamic scheduling, update the task filter for the dynamic scheduling configuration and replace the **Matching Skills for Dynamic Scheduling** matching criteria with the **Matching Mandatory Skills for Dynamic Scheduling** matching criteria. For more information, see Create a task filter.

For configuring optional skills, navigate to **Field Service** > **Administration** > **Configuration**, click the **Assignment** tab and set **Auto-selection of agents for tasks requires them to have skills** to one of the following:

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- All - indicates that the agent must have all optional skills listed in the task for task assignment.
- Some - indicates that the agent must have at least one optional skill listed in the task for task assignment.
- None - indicates that the agent is not required to have any optional skill.

Mandatory Skills system properties

The **Migrate Skills to Task Skill M2M** script migrates skills from existing tasks to the Task Skills [task_m2m_skill] table. Configure the task tables included in the migration using the *`skills_management.migration`* system property.

The mandatory skills feature adds the following system properties.

Note: To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties installed with Mandatory skills feature

Property name	Description
work.management.use.mandatory.skills	Enables the mandatory skills feature and indicates that the Task Skills [task_m2m_skill] table is being used for work orders and work order tasks. • **Type**: true/false • **Default value**: false
skills_management.migration	Lists the task tables to migrate to the Task Skills [task_m2m_skill] table when an admin runs the **Migrate Skills to Task Skill M2M** script. • **Type**: choice list • **Default value**: wm_task,customerservice_case,wm_order
com.snc.skills_management.task_skill_migrated_tables	Contains a list of tables for which the **Skills** field has already been migrated to the Task Skills [task_m2m_skill] table. If the table name is listed in this property, the data has been migrated and will not be migrated again. • **Type**: choice list • **Default value**: none

Related topics

Skills table fields

Migrate skills to the Task Skill table

Migrate data from the **Skills** field to the Task Skills table to utilize mandatory skills support for executing tasks in a case or work order.

Before you begin

Role required: wm_admin, admin

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About this task

The Task Skills [task_m2m_skill] table stores skills and mandatory skills.

In the Customer Service Management application, the assignment workbench uses the Task Skills table instead of the **Skills** field in the Case table to display agents based on the evaluation criteria for task assignments.

In the Field Service Management application, the work order task assignments done using auto-assignment, dynamic scheduling, and Dispatcher Workspace use the Task Skills table instead of the **Skills** field in the Work Order and Work Order Task tables to assign agents for task assignments.

Procedure

1. Add a system property with the following settings.

Option	Description
Create a system property for a table in the Customer Service Management application.	Make sure that you are logged in to the Customer Service Management application. **Note:** Configure the System Properties form to display the **Suffix** field. In the **Suffix** field, enter the name of the system property as follows: `com.snc.skills_management.<table_name>_mig` where <table_name> is the name of a case task table from which the skills need to be copied.
Create a system property for a table in the Field Service Management application.	Make sure that you are logged in to the Global application. In the **Name** field, enter the name of the system property in the following format: `com.snc.skills_management.<table_name>_mig` where <table name> is the name of a work order or work order task table from which the skills need to be copied.

2. In the **Type** field, set the value to **true**.
3. Click **Update**.
4. Navigate to **System Definition** > **Fix Scripts** and run the **Migrate Skills to Task Skill M2M** fix script.
   The skills are copied to the task_m2m_skill table. The name of the table from which the skills are copied gets appended to the `com.snc.skills_management.task_skill_migrated_tables` system property. When the script is run again, it ignores all tables from which skills have already been migrated.

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Configure assignment workbench

The assignment workbench uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking. Managers can view these results and click one button to assign a task.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

There are three types of matching criteria available for selection:

- Simple match
- Aggregate
- Scripted

After creating matching criteria, create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.

If necessary, set the assignment workbench properties.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Configure Assignment Workbench

Task	Description
Create assignment workbench matching criteria	The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate agents in a selected group and provide an overall ranking. To create matching criteria, select the type and then use the fields related to that type to build the query.
Create an assignment workbench configuration	After creating matching criteria, create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.
Configure assignment workbench properties	Configure the properties related to the assignment workbench display.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Assignment workbench overview

Matching criteria for case assignment

Matching rules for case assignment

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Create assignment workbench matching criteria

Create one or more matching criteria that can be used in an assignment workbench configuration.

Before you begin

Role required: admin

About this task

The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate agents in a selected group and provide an overall ranking. The Matching Criteria [matching_dimension] table stores the individual criterion that can be added to a matching rule to create an assignment workbench configuration.

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Criteria**.
2. Click **New**.
3. Enter a **Name** and a **Description** for the criterion.
4. Select the **Type** of matching criterion.

Option	Description
Simple Match	Creates a one-to-one match. For example, match the time zone of an agent with the time zone of a task location.
Aggregate	Takes a simple query as an input and pro vides aggregate results. The query returns a set of users.
Scripted	Includes a scripted query which returns a list of users.

5. To create a **Simple Match** criterion, fill in the following fields.

Simple match criterion fields

Field	Description
Applies to	The type of task that this criterion applies to.
Field	The field from the selected task table that you want to match.
Resource Table	The table that stores the resource to use for this matching criterion.
Resource Matching Field	The field from the resource table that you want to match.
Resource Field	The resource field to be displayed for the task records that match the resource records.

6. To create an **Aggregate** criterion, fill in the following fields.

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Aggregate criterion fields

Field	Description
Aggregate Table	The type of task that this criterion applies to.
Aggregate Filter	Use the condition builder to create a query that returns a set of users from the selected task table. For example, create a query that returns customer service cases with the following states: New, Open, Awaiting info.
Aggregate Field	The field from the selected task table to be displayed for the task records that match the query conditions.

7. To create a **Scripted** criterion, fill in the following fields.

Scripted criterion fields

Field	Description
Script	Create a customized script which returns a list of users. An example script is included. The expected return from a customized script is an array of resource sys_ids.
Aggregate Field	The field from the selected task table to be displayed for the task records that match the query conditions.

8. **Optional:** Enter a **Display Name**.
9. **Optional:** Enable the **Use Reference** field.
   If you use a reference field, fill in the following fields.

Reference fields

Field	Description
Reference Table	The table that stores the referenced information.
Reference Filter	Add filter conditions to return the desired reference information.
Reference Field	The field from the selected reference table to be displayed for the records that match the filter conditions.
UI Filter Label	The label for this field that appears on the assignment workbench

10. Click **Submit**.

Related topics

Matching criteria for case assignment

Create an assignment workbench configuration

Use a matching rule to create a configuration for the assignment workbench.

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Before you begin
Role required: admin

About this task
The assignment workbench configuration is stored in a matching rule that is based on the **Selection criteria** matching type. The default configuration uses the **Recommendation for Case Assignment** matching rule, which includes three of the four default matching criteria:

- Availability Today
- Matching Skills
- Assigned Cases

You can modify or create matching criteria and then modify the **Recommendation for Case Assignment** matching rule as needed or you can create your own configuration.

Procedure
1. Navigate to **All** > **Routing and Assignment** > **Matching Rules** to access the Matching Rules list.
2. Click **New**.
3. Enter a **Name** for the matching rule.
4. If desired, enter an **Execution Order** for the matching rule.
   This is the order in which this matching rule is to be executed. Similar to business rules, matching rules are processed based on execution order, from the lowest to the highest.
5. In the **Applies To** tab, select the **Table** that stores the task for which the matching rule is being created.
6. Use the **Conditions** field to build one or more conditions on the selected table.
   A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by clicking the **X** to the right of a condition.
7. In the **Resource** tab, select **Selection Criteria** in the **Matching** field.
8. Click **Submit**.
9. From the Matching Rules list, open the matching rule that you just created.
10. In the **Select Criteria** related list, click **New**.
    This opens the Select Criterion form.
11. Select a **Criterion** from the Matching Criteria list.
12. Select how the criterion is to be used in the **Use for** field.

Option	Description
Ranking and Display	Uses the criterion to determine agent ranking and displays it in a column on the workbench.
Display Only	Displays the criterion in a column on the work bench but does not use it to determine agent ranking.
Ranking and No Display	Uses the criterion to determine agent ranking but does not display it on the workbench.

13. Select a **Ranking Method**.

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Option	Description
More is better	A higher value is better. For example, more availability is better when determining the agent ranking.
Less is better	A lower value is better. For example, fewer cases are better when determining the agent ranking.

14. Click **Submit**.
15. Repeat steps 10 through 14 for each criterion to add to the matching rule.
16. If desired, change the weight of a criterion by double-clicking the **Weight** field in the **Select Criteria** related list and entering a new weight.
    Each matching criterion has an assigned weight. By default, the matching criteria in the Recommendation for Case Assignment matching rule have an assigned weight of 10. You can assign a higher weight to the criteria that are more important.
17. If desired, set the threshold for a criterion by double-clicking the **Threshold** field in the **Select Criteria** related list and entering a threshold number.
    A threshold sets a minimum requirement for a criterion. It may be necessary to personalize the list and add the **Threshold** column.
18. If desired, set a criterion active or inactive by double-clicking the **Active** field in the **Select Criteria** related list and selecting **true** or **false**.
    Changing this setting has an immediate impact on the agent ranking. It may be necessary to personalize the list and add the **Active** column.

Configure assignment workbench properties

Configure the properties related to the assignment workbench display.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Properties**.
2. Set the following properties, as needed.

Option	Description
Title for the macro button *assignment_workbench.find.agents.title*	Creates the title for the macro button on the task form. The default is **Find Agents**.
When enabled opens the assign ment workbench in a new window *assignment_workbench.new.window*	Opens the assignment workbench in a new window. The default is **False**.
Number of agents per page *assignment_workbench_no_of_agents*	Set this property to 20, 30, or 50 agents. To get better performance, do not use more than 50 agents per page. The default is **30**.

3. Click **Save**.

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Configure major issue management

Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, provide information to these customers, and manage the resolution process.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

This feature enables you to efficiently manage the communication and resolution process for issues that impact multiple customers. With major issue management, you can identify impacted customers who have not yet reported an issue and proactively create cases for these customers.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Major Issue Management

Task	Description
Activate Major Issue Management	Activate the Major Issue Management (com.sn_majorissue_mgt) plugin.
Configure Customer Service Properties	Enable a system property to synchronize data between parent and child cases.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Major issue management overview

Install the Major Issue Management application

You can install the Major Issue Management application (com.sn_majorissue_mgt) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Major Issue Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

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About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Major Issue Management application (com.sn_majorissue_mgt) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure case synchronization

Configure the major issue management system properties to enable synchronization between major cases and associated child cases.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. Enable the **Synchronize fields from parent to child case** property.
3. In the **Comma separated list of fields that synchronize from parent to child cases** property, add a comma-separated list of fields that synchronize from the major case to each of the associated child cases.
4. **Optional:** Set the **Processes SLA asynchronously during parent to child case creation and synchronization** property to false to process the SLA synchronously.
   This property is enabled by default.
5. Click **Save**.

Exclude a case type from major cases

Edit the CSUIActionsImpl script include to exclude specific case types from major case support.

Before you begin

Role required: admin

About this task

Onboarding and order cases are excluded by default.

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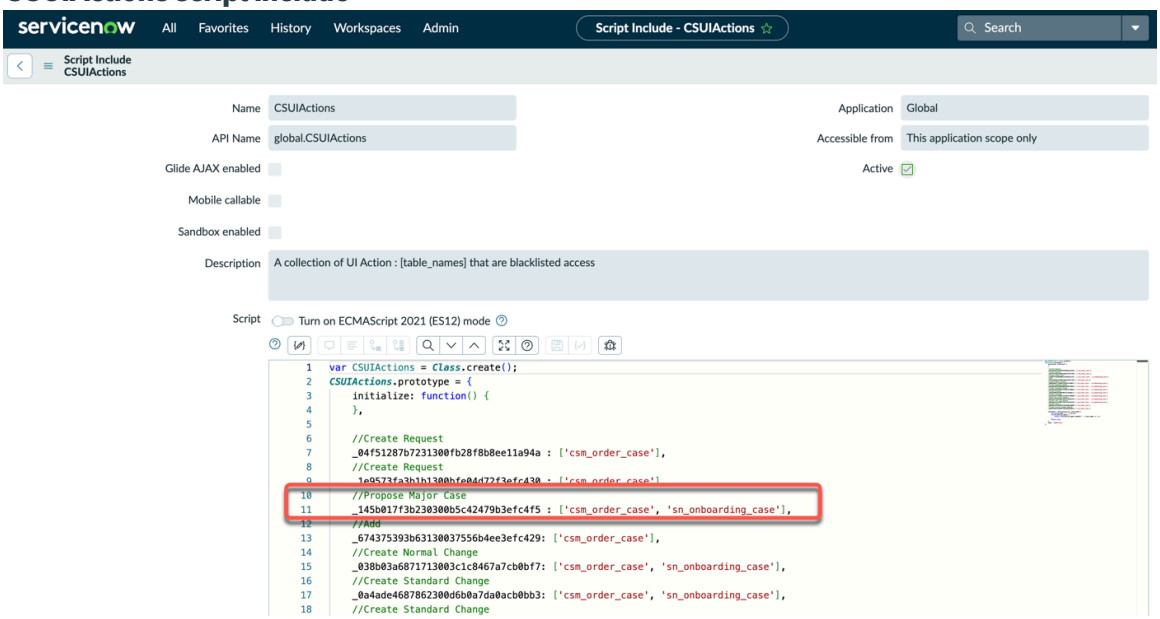
> **Important:** Test this change on a subprod instance to verify that it functions correctly. Since this is a customization to a file, your instance can't get future upgrades on the CSUIActionsImpl script include.

Procedure

1. Navigate to **All** > **System UI** > **Script Includes**.
2. In the **Script Includes** list, search for **CSUIActions**, and open the **CSUIActions script include**.
3. In the **Script** section, copy the `//Propose Major Case _145b017f3b230300b5c42479b3efc4f5 : ['csm_order_case', 'sn_onboarding_case'],` code.

CSUIActions script include



4. Go back to the **Script Includes** list, search for **CSUIActionsImpl**, and open the **CSUIActionsImpl script include**.
5. Paste the code you copied from the **CSUIActions** script include, and add the case type that you want to exclude.

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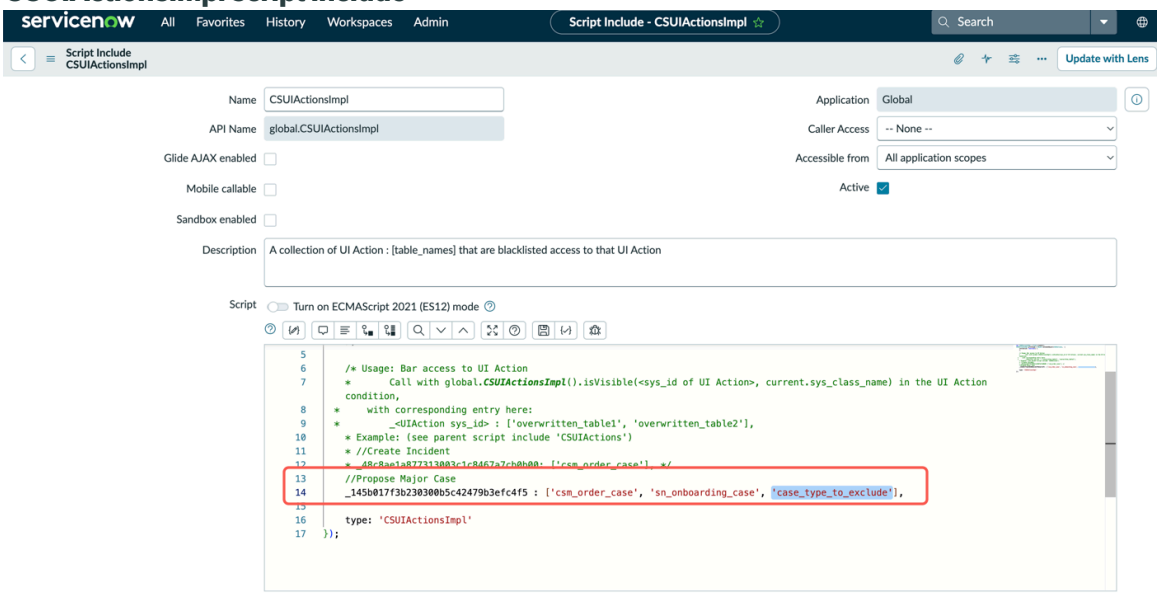
CSUIActionsImpl script include



6. Save the record.
   The case type you added can no longer be proposed as a major case.

Major Case form view

Major issue management provides the Major Case form view, which includes the Major Case Information form section and the Child Cases related list.

The Major Case form view does not display account-related information because a major case is not linked to a specific account, contact, or consumer. This information is stored in the child cases associated with a major case.

Major Case Information form section

Major cases and major case candidates include the Major Case Information form section which includes the following fields.

Major Case Information form

Field	Description
Major case state	A major case can be in one of these states: • **Proposed**: the initial state when a candidate case is created or proposed by an agent or manager. • **Accepted**: the Initial state when a major case is created by a manager or when a candidate case is promoted by a manager. • **Rejected**: the candidate case is rejected by a manager. • **Cancelled**: the case is cancelled.
Business impact	The business impact of the issue identified in the major case.

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Major Case Information form (continued)

Field	Description
Probable cause	The probable cause of the issue identified in the major case.
Affected Customers	The recipients list selected for the major case. Child cases are created for the accounts or consumers included in the recipients list. This field is only visible when the major case state is Accepted.

Customer service agents can update the **Business impact** and **Probable cause** fields as well as add **work notes**. Major issue managers can update the **Business Impact** and **Probable Cause** fields and attach a recipients list. The **Affected Customers** field is only visible when the major case state is Accepted.

The **Work notes** field on the major case form is updated when a major case is proposed or a candidate case is created manually. The **Work notes** field on associated child cases is updated when a major case is accepted.

When a major issue manager rejects a candidate case, the **Major Case State** field is set to Rejected and the **Work notes** field is updated with the case state. The candidate case reverts to a regular case.

Related lists

Child cases

All child cases associated with a major case are added to this list. Child cases are created automatically from the recipients list and can also be added or removed manually.

Suggested child cases

Cases that have been identified by the AI detection workflow as potential members of the major case group are located in this list. The major issue manager can add these cases as child cases on the major case, or remove them.

Components installed with Major Issue Management

Several types of components are installed with the major issue management feature.

Roles installed with Major Issue Management

Major Issue Management provides these roles.

Role	Description	Contains Roles
Major issue manager [sn_majorissue_mgt.major_issue_manager]	Users with this role can: • Create major cases • Approve or reject major case candidates • Add or remove child cases from major cases • Add or remove impacted accounts (B2B) or consumers (B2C)	• sn_customerservice_agent • sn_customerservice_consumer • sn_publications_recipients_use • sn_publications_recipients_list

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Role	Description	Contains Roles
	The customer service manager role [sn_customerservice_manager] contains the major issue manager role.	

Properties installed with Major Issue Management

Major Issue Management provides these properties.

To access these properties, navigate to **Customer Service** > **Administration** > **Properties**.

Note: To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Major issue management properties

Property	Description
Synchronize fields from parent to child case sn_customerservice.parent_child_case_sync	Enable this property to synchronize fields from a major, or pa associated child cases. • Type: true|false • Default value: false • Location: **Customer Service** > **Administration** > **Propertie**
Comma-separated list of fields that synchronize from parent case to child cases sn_customerservice.case_fields_to_sync	Specifies the list of fields to synchronize from the major, or p associated child cases. • Type: string • Default value: priority,state,comments,work_notes,assigned_to,close_no • Location: **Customer Service** > **Administration** > **Propertie**
Processes SLA asynchronously during parent to child case creation and synchronization sn_customerservice.parent_child_case_sla_async	Enables major issue management to process the SLA async child case creation and parent-to-child case synchronizatior • Type: true|false • Default value: true • Location: **Customer Service** > **Administration** > **Propertie**
Enable case type support for major cases enable_case_type_for_major_case	Enable this property to create major cases with the same cas candidate case. When enabled, the system preserves the sy the candidate case when creating the major case and uses implementations to determine fields to copy. • Type: true|false • Default value: true (new installations), false (upgrades) • Location: Go to **System Properties** and search for `enable_case_type_for_major_case`.

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Major issue management properties (continued)

Property	Description
	Note: For upgrade installations, this property defaults preserve existing behavior where all major cases are cre cases. Before you enable case type support, determine default implementation is sufficient, or whether you nee implementations for your custom case types.

Configure ServiceNow Otto for CSM Major Issue Management

As an admin, you can customize Major Issue Management detection to match the needs of your organization.

The ServiceNow Otto for CSM Major Issue Management feature is delivered by the `com.sn_csm_mim_gen_ai` plugin. This plugin is included by default with the ServiceNow Otto for CSM plugin. See Install ServiceNow Otto for Customer Service Management (CSM) for more information. It runs on a Flow Designer flow called **Major case agentic workflow**. When the flow triggers on a new case, it invokes the **Major Cases Similarity Search** Now Assist skill, evaluates the results, and updates the case record with a suggested major case link.

To activate ServiceNow Otto for CSM Major Issue Management, complete the following high level steps:

> **Note:** The flow is **inactive** by default. Even if the AI skill is activated, no AI detection runs on new cases until the **Major case agentic workflow** flow is activated.

1. Activate the **Major Cases Similarity Search** AI skill and confirm its access roles.
2. Activate the **Major case agentic workflow** flow and edit its trigger conditions to control which cases the AI detection runs against (for example, restrict by category, account, or product in addition to the default priority and parent conditions).
3. Extension point script include: Override detection parameters — similarity thresholds, search profiles, maximum result counts, and additional match field filters — by extending `NowAssistMajorIssueExtPointImpl`.

What you can configure

- Which cases the AI detection evaluates (trigger conditions)
- How strict the similarity matching is (similarity thresholds)
- How many similar cases the AI returns (maximum result counts)
- Which AI search profiles are used (which case fields are searched and how they are weighted)
- Additional exact-match field filters layered on top of the similarity search (for example, restrict matches to cases on the same account or product)
- The minimum number of similar non-major cases required before a new major case is auto-proposed
- Custom eligibility rules for which cases qualify (override `isValid()`)

Related topics

Activate Now Assist for CSM Major Issue Management

Now Assist for CSM Major Issue Management Properties

Major case detect AI agent

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Activate Now Assist for CSM Major Issue Management

Activate the AI skill, test it against your data, then activate the agentic workflow to begin AI-assisted major case detection on new cases.

Before you begin

Role required: admin

- The `com.sn_csm_mim_gen_ai` plugin must be installed
- The Major Issue Management (com.sn_majorissue_mgt) application must be installed (provides the `suggested_major_case` field and major issue management lifecycle)

About this task

This procedure has three stages. Complete all three before AI detection takes effect on production cases.

Procedure

1. Activate the **Major Cases Similarity Search** Now Assist skill.

   a. Navigate to **Now Assist Admin** > **Now Assist Skills** > **Customer** > **CSM** > **Major Cases Similarity Search**.

   b. Select **Activate Skill**.

   c. Turn on the **Flow Action** display setting.

   > **Important:** The flow action display must be enabled. If it is not, the skill can't be invoked from the **Major case agentic workflow** flow.

   d. Confirm that the access roles include the defaults.

   The following roles are granted execute access on the skill by default:

   - `sn_customerservice_agent`
   - `sn_customerservice.consumer_agent`
   - `sn_customerservice.consumer`
   - `sn_customerservice.customer`

2. Test the skill with your data before activating the workflow.

   a. In the **Now Assist for CSM Major Issue Management** scope, navigate to **Now Assist Skill Kit** > **Home** > **ServiceNow skills** > **Major Cases Similarity Search**.

   b. Select **Run Test**.

   c. Use the default test values, then verify the results returned against both the major case profile and the non-major case profile.
   Running the test against representative cases in your environment helps validate that the OOB similarity thresholds and search profiles return appropriate matches before live cases are evaluated.

3. Activate the **Major case agentic workflow** flow.

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a. Navigate to **Flow Designer** > **Flows** and search for **Major case agentic workflow**.

b. Open the flow and review the default trigger.

The default trigger is: **Case Created where Priority is 1 - Critical, or Priority is 2 - High; and Parent is empty**.

The flow is delivered with a single action, **Search similar major case**, which calls the sub-flow that runs the AI skill and updates the case.

c. **Optional:** Edit the trigger conditions to further restrict which cases run through detection.

(Optional) You can add filter conditions such as category, account, product, or any other case field. More restrictive triggers reduce the number of AI skill executions, which lowers cost and load.

d. Select **Activate** on the flow.

4. **Optional:** Adjust detection behavior by changing the configuration properties.

(Optional) The defaults work for most environments. To adjust thresholds, search profiles, or match fields, extend the extension point implementation.

Result

The AI detection runs automatically on each newly created case that matches the flow's trigger conditions. The workflow either links the case to an existing major case or proposes a new major case for review. If there are no cases that match, or a major case is not required, no action is taken.

What to do next

Now Assist for CSM Major Issue Management Properties

Now Assist for CSM Major Issue Management Properties

The ServiceNow Otto for CSM Major Issue Management application is configured through the `NowAssistMajorIssueExtPoint` extension point and the trigger conditions on the **Major case agentic workflow** flow. This reference describes every configurable property, the valid values, the default, and the impact.

Flow trigger properties

Configure these properties in Flow Designer on the **Major case agentic workflow** flow trigger.

Property	Description	Default	Impact
Trigger conditions	The case-record conditions that cause the flow to run. Add filters such as category, account, product, or any other case field to control which cases the AI detection evaluates.	Priority is 1 or 2; Parent is empty	More restrictive conditions reduce AI skill executions, which lowers cost and processing load.

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Major case search configuration

These properties come from `NowAssistMajorIssueExtPoint.getConfigForMajorCase()`. They control the search for similar existing major cases.

Property	Description	Values	Default	Impact
`maxSearchResults`	Maximum number of similar major cases returned by the AI search.	Integer 1–50	10	Higher values increase AI search cost and latency. Lower values may miss relevant matches.
`similarityThreshold`	Minimum similarity score a major case must meet to be included in results.	0.0–1.0	0.75	Higher values return fewer, more precise matches. Lower values cast a wider net with more noise.
`searchProfile`	AI search profile used when searching for similar open major cases. Determines which indexed fields and ranking logic apply.	String (profile name)	`sn_csm_mi_generative_insight_major_cases_p`	You can edit this profile or replace it with a custom profile. The profile must return major cases.
`matchFieldList`	Case fields whose values are appended as additional exact-match filter conditions on the AI search.	Array of field names (for example, `["account", "product"]`). Empty field values are skipped.	`[]`	Restricts the search to cases that exact-match on the listed fields. For example, with `["account"]`, only cases from the same account are considered.

Non-major case search configuration

These properties come from `NowAssistMajorIssueExtPoint.getConfigForNonMajorCase()`. These properties control the search for similar non-major cases.

Property	Description	Values	Default	Impact
`maxSearchResults`	Maximum number of similar non-major cases returned by the AI search.	Integer 1–50	10	Higher values increase AI search cost and latency. Lower values may undercount similar cases and suppress major case escalation.
`similarityThreshold`	Minimum similarity score a non-major case must meet to be included in results.	0.0–1.0	0.70	Higher values enforce stricter matching before escalation is

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Property	Description	Values	Default	Impact
				considered. Lower values may trigger escalation proposals more liberally.
`searchProfile`	AI search profile used when searching for similar open non-major cases.	String (profile name)	`sn_csm_major_case_non_major_case`	Determines which indexed fields and ranking logic apply during the non-major search.
`matchFieldList`	Case fields whose values are appended as additional exact-match filter conditions on the AI search.	Array of field names. Empty field values are skipped.	`[]`	Restricts the search to cases that exact-match on the listed fields.
`minSimilarCasesForMajor`	Minimum number of similar non-major cases the AI must return before the new case is auto-proposed as a major case. Below this threshold the flow exits with no updates.	Integer 1–N	5	Lower values make major case escalation easier to trigger. Higher values require stronger evidence before a new major case is proposed.

Extension point method reference

The `NowAssistMajorIssueExtPoint` extension point exposes three methods that you can override.

Method	OOB default	Purpose
`isValid(glideRecord)`	Returns `true` for all cases	Pre-flight eligibility check called before skill invocation. Override to exclude specific case types, domains, or any other condition.
`getConfigForMajorCase(glideRecord)`	`limit: 10, threshold: 0.75`	Returns the search configuration used when scanning for existing major cases.
`getConfigForNonMajorCase(glideRecord)`	`limit: 10, threshold: 0.70`	Returns the search configuration used when scanning for similar non-major cases.

Major case detect AI agent

This agent detects major case candidates by searching for cases similar to a newly created case, and either links the case to an existing major case or proposes it as a new major case.

Workflow

The agent runs when a case is created that matches its trigger condition.

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1. Get the triggering case's details, including its major case state, parent case, and a combined search query built from its short description, description, and recent comments.
2. Search for cases similar to the triggering case. The agent first searches existing accepted or proposed major cases; if none match, it falls back to searching open non-major cases.
3. Decide whether to link the case to an existing major case or, if enough similar non-major cases are found, propose the case as a new major case.
4. Update the case: set `suggested_major_case` and `business_impact`, and add a work note with the AI-generated reasoning.

Note: The trigger that starts this agent is shipped **inactive**. An administrator must activate it before the agent runs on any case.

Configuration

Field	Description
Allow third party to access this AI agent	When enabled, third-party AI agents can use this agent. This value is off (false) by default. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the External discoverable field.
Allow AI specialists to access this AI agent	When enabled, AI specialists can use this agent. This value is off (false) by default. When set to true, more configuration options for tools become available so that an AI specialist can map inputs and response templates to tool outputs. This setting is defined in the AI Agent configs [sn_aia_agent_config] table on the Specialist enabled field.
Manage long-term memory	When enabled, all previous user interactions are used as context for the LLM. This value is off (false) by default. This setting is defined by the *`sn_aia.ltm.enable_long_term_memory`* system property. For more information, see ServiceNow Otto AI agents reference.
Tools	**Script tool** Get Case Details – retrieves the case number, major case state, parent case, and a combined search query for the triggering case. **Script tool** Detect Similar Cases – performs a semantic similarity search for cases similar to the triggering case. **Script tool** Update Major Case Suggestion – updates the case with the major case link or proposal and writes the AI-generated work note.
Allowed user roles The specific user roles that can access this AI agent.	sn_majorissue_mgt.major_issue_manager
Data access roles	sn_majorissue_mgt.major_issue_manager

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Configuration (continued)

Field	Description
The specific user identity roles that determine which data the AI agent can access and what actions it can take.	
Triggers	Optional. None defined by default. An admin can specify triggers if desired. For more information, see Add a trigger to an AI agent. Fires when a case is created with priority 1 or 2, no parent case, and a major case state that is not already proposed or accepted.
Channels	Configure an assistant for Virtual Agent or ServiceNow Otto panel using Assistant Designer.
Used in agentic workflows	Detect and link major case candidates during major issue management

Learn more about Customer Service Management at Customer Service Management. For the configurable detection thresholds this agent uses, see Configure ServiceNow Otto for CSM Major Issue Management.

Targeted communications

The Targeted Communications application provides the ability to create and send articles and emails to internal and external customers.

Users with the publications author (sn_publications.author) and publications administrator (sn_publications.admin) roles can use the Targeted Communications application to author publication articles and emails for employees, customer contacts and accounts, and consumers. Articles are available for viewing from the self-service portals and can also be sent out as email notifications.

Each publication article includes content and a specified list of recipients. Articles can also include optional email notification. Recipients lists can be created dynamically by using a condition builder to identify the desired conditions, by running scripts, or by manual file upload. Recipients can be added to or removed from a list manually and lists can have both dynamically generated and manually added records of the same type.

When creating an article, publication authors specify a publish date and an expiration date. The system uses these dates to automatically publish and expire the article. Authors can also request a review prior to publishing an article. Articles can include an optional email notification that is sent to all recipients in the recipients list when the article is published. In this email notification, all of the recipients are included in a **bcc** list to maintain privacy.

Note: Delegates of recipient list users do not receive published email notifications.

The process of publishing articles is based on workflows and two default workflows are provided: one to publish articles instantly and one that requires approval prior to publishing. Publication administrators can update workflows and add users with the publications approver

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(sn_publications.approver) role to perform reviews. Both authors and administrators can monitor publications and see which users have received and viewed the information.

Customer contacts and consumers can view publications by logging in to the Customer Service Portal or the Consumer Service Portal and clicking the **Publications** link in the portal header. Employees can view these publications by navigating to **Targeted Communications** > **Publications** in the application navigator.

Note: For more info see, Components installed with additional plugins for Customer Service Management

Publication article stages

Publication articles progress through several stages which are displayed in a process flow formatter on the Publication form.

Publication stages

Stage	Definition
Author	The initial state of the publication creation process.
Review	Publications that are waiting for review. A publication cannot be updated when it is in the **Review** stage.
Ready To Publish	Publications that have been reviewed and are ready to be published.
Published	Publications that that have reached their **Publish Date**.
Expired	Publications that have reached their **Expiry Date** or that have been manually expired.
Cancelled	Pending publications that have been cancelled.

States are shown in a process flow formatter at the top of the Publication form. The current state is indicated by a blue underline. States that have been completed are indicated by a blue check mark.

Publication lists

The Targeted Communications application menu includes several views of publication records.

Publications lists

State	Definition
Active Publications	Includes publications in the following stages: • Author • Review • Ready to Publish • Published
Draft Publications	Includes publications that have been created and sent for review.
Expired Publications	Includes publications that have reached their **Expiry Date** or have been set to **Expired**.

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Targeted communications workflows

Starting with the Zurich release, legacy publication workflows for the Targeted Communications (com.sn_publications) application have been migrated to low code flows in Workflow Studio. The functionality of the flows remains the same.

If customers have customized the legacy workflows, a fix script deactivates the new flows and activates the legacy workflows during instance upgrade.

Note: The new flows are only activated if the legacy workflows have not been customized.

For more information, see Targeted communications publication workflows.

Recipients lists

Create the recipients list for a targeted communications that can include internal users, customer, accounts, contacts, consumers, and business organizations. You can create the recipient list using the methods of user import, dynamic lists, or scripting.

When an article is published, the recipients on this list can view the article on the Customer or Consumer Service Portal. Recipients can also receive optional email notifications.

Recipients lists are also used by the Major Issue Management application to create child cases for a major case.

Recipients lists are created in the following ways:

- By creating a list of imported users.
- By creating a dynamic list based on selected conditions.
- By creating a script.

Recipients lists can have both dynamically generated and manually added records of the same type.

The system administrator can manage a scheduled job to refresh recipient lists. This scheduled job, *`Targeted Communications Refresh recipient list`*, adds new recipients to each of the active published articles. The new recipients receive email notification of the article and are granted access to view the article on the portal.

Create a recipient list by importing contact information

Create a recipient list by importing contact information. For contacts, supported file types include xls and csv.

Multiple files can be imported into the same recipient list, with new recipients appended to the recipient list file. The system checks that the accounts and contacts exist in the system and only imports those that exist. Duplicate entries are not created. At the end of the import process, the system displays a status with the number of records imported and rejected.

The system uses the sys_id and the email address attributes to match contacts. It first looks for a matching sys_id match. If not found, it then looks for a matching email address. If neither are found, the record is rejected.

Create a recipient list by importing account, consumer, or internal user information

Create a recipient list by importing account, consumer, or internal user information. The supported file type is xls.

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The system uses the following attributes to match the imported records:

- Account: Uses the sys_id and the account number. Attempts to match the sys_id. If not found, then attempts to match using the account number. If neither are found, the record is rejected.
- Consumer and User: Uses the sys_id or the email address. Attempts to match the sys_id. If not found, then attempts to match the email address. If neither are found, the record is rejected.

Note: Column names are case sensitive. For example, use **sys_id** and **number** for accounts and **email** for consumers and users.

Create a recipient list using a script

Create a recipient list using a script with these supported entities: contact, company/account, consumer, and internal user. The output of the script is an array of sys_ids of the corresponding entity. After creating the recipient list, the system shows the total number of records identified, added to the list, and rejected.

To create a recipient list using a script, select Dynamic Condition in the **Method** field on the Recipients List form and enable the **Show Script** check box. Then create your script in the **Script** field.

Targeted Communications publication workflows

The Targeted Communications application (com.sn_publications) includes default workflows that are used for publishing articles.

The application includes two publishing workflows:

- **Instant Publish**: publishes an article instantly.
- **Publish With Approval**: requires approval prior to publishing.

Migrating workflows to Workflow Studio flows

Starting with the Zurich release, legacy workflows for the Targeted Communications application have been migrated to low-code flows in Workflow Studio. The functionality of the new flows remains the same.

During an upgrade, the logic checks if a publication workflow or its configuration has been customized.

- If customizations are detected in the workflows or the configuration, the system reverts to the legacy workflows and disables the new flows and related configurations.
- If no customizations are detected, the system replaces the legacy workflows with the new flows.

This upgrade logic ensures that customizations are preserved and are not overwritten.

Summary of upgrade actions

The following table provides a summary of the actions that take place during upgrade depending on publication workflow and configuration customization.

Summary of upgrade actions

Setting	Customization detected	No customization detected
Legacy workflows	Activated	Deactivated

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Summary of upgrade actions (continued)

Setting	Customization detected	No customization detected
New flows	Deactivated	Activated
Legacy UI policies	Activated	Deactivated
New UI policies	Deactivated	Activated
Legacy business rules	Activated	Deactivated
New business rules	Deactivated	Activated
Workflow config value	Set to legacy workflows	Set to new flows

Key steps during upgrade to Zurich

The following table describes the key steps that the system takes during upgrade to the Zurich release.

Key steps during upgrade to Zurich

Step	Description
1. Customization detection	The logic checks if the legacy workflows or the sn_publications_workflow_config table record 6c9b0e65c30112004bd67bfaa2d3ae56 have been customized. If customizations are found, the system reverts to the legacy workflows.

2. Legacy workflow activation	• The legacy versions of the workflows are activated:
	  ○ Instant Publish
	  ○ Publish With Approval
	• The script chooses the correct workflow version based on the installed plugins.
	• If the Customer Service Base plugin is active, the script activates the following workflow versions:
	  ○ Instant Publish (Base): e7de79b7c3401300e7c7d44d81d3aece
	  ○ Publish With Approval (Base): 33987078c3d01300e7c7d44d81d3ae2f
	• If the plugin is not active, the script activates the following workflow versions:
	  ○ Instant Publish: f6d5c49a93201300ac40f5be867ffb3f
	  ○ Publish With Approval: 5be6c89a93201300ac40f5be867ffba1

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Key steps during upgrade to Zurich (continued)

Step	Description
3. New flow deactivation	• New Flow Designer flows for publications are deactivated: ○ Publish With Approval Flow ○ Instant Publish Flow • All snapshots for these flows are also deactivated.
4. UI policy management	• Legacy UI policies are activated: ○ Approver field mandatory (legacy) ○ Hide approver field (legacy) ○ Show legacy workflow • New UI Policies are deactivated: ○ Hide approver field ○ Show process flow ○ Approver field mandatory
5. Business rule management	• Legacy business rules for starting the old publication workflow are activated. • New business rules related to new flows are deactivated.
6. Workflow configuration update	The workflow configuration record (sn_publication_workflow_config) is updated to point to the correct process workflow: • If legacy workflows are present, the config is set to use the corresponding legacy flow. • If not, it defaults to the Instant Publish Flow.

What to do before and after upgrading

Follow these steps before and after upgrading to the Zurich release:

- Before upgrading, review your publication workflow customizations.
- After upgrading, verify that the correct workflows, flows, UI policies, and business rules are active as expected.
- If you want to use the new flows, remove customizations and reactivate the new flows and related configurations.

If customizations are detected during upgrade

Setting	If customization detected (sys_id)
Legacy workflows	Activated:

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If customizations are detected during upgrade (continued)

Setting	If customization detected (sys_id)
	• Instant Publish: a9587563d76302004f1e82285e6103ae • Publish With Approval: 51a2f923d76302004f1e82285e610355
New flows	Deactivated: • Publish With Approval: e91f81a9a3e352107ee9d8b8651e6137 • Instant Publish: ec48616da36752107ee9d8b8651e611f
Legacy UI policies	Activated: • Mandatory Approver: df2ea83bc34112004bd67bfaa2d3aef5 • Hide Approver: 3afeac3bc34112004bd67bfaa2d3ae29 • Show Legacy Workflow: 567136f84f0c62107ee9a701b1ce0b31
New UI policies	Deactivated: • Mandatory Approver (Flow): 5a0f230ea3a312107ee9d8b8651e6110 • Hide Approver (Flow): 26d92306a3a312107ee9d8b8651e6107 • Show Process Flow: 57f5c434a39b52107ee9d8b8651e61e4
Legacy business rules	Activated: • Start New Publication: 11eb8390c3a012004bd67bfaa2d3aeb8 • Approver List Required: 6a88a328c39112004bd67bfaa2d3ae04
New business rules	Deactivated: Approver List Required (New Flows): 47b133b2a36b12107ee9d8b8651e61d1
Workflow config value	Set to legacy flow: • Config Record: 6c9b0e65c30112004bd67bfaa2d3ae56 • Legacy Workflow sys_ids: a9587563d76302004f1e82285e6103ae, 51a2f923d76302004f1e82285e610355

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Workflow Config table update

The upgrade to Zurich adds the following columns to the Workflow Config [sn_publications_workflow_config] table:

- **Process Workflow** (Workflow Studio flow field)
- **Workflow** (legacy workflow field)
- **Approvers**

Add or remove an approver

Facilitate approval process by adding or removing approvers from your publication workflow.

Before you begin

Role required: sn_publications.admin

Procedure

1. Navigate to **All** > **Targeted Communications** > **Publication Workflow**.
2. Select a workflow.
   The approvers assigned to the workflow are displayed in the **Approvers** field.
3. To add an approver, click **Edit Approvers** next to the **Approvers** field and select an approver from the Users list.
   This list includes users with the sn_publications.approver role. The selected user is added to the **Approvers** field. Approvals on workflows is a platform functionality. For more information, see Approval and rollback workflow activities.
4. To remove an approver, click **Edit Approvers** next to the **Approvers** field, select the approver's name, and then click **Remove**.
   The approver's name is removed from the **Approvers** field.
5. Click **Update**.

Create a recipients list

Create and save a list of users to receive targeted communications.

Before you begin

Role required: sn_publications.author, sn_publications.admin, sn_customerservice_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

A recipient list can include internal users, accounts, contacts, consumers, or business organizations. Create a recipient list using any of the following methods:

- By importing a list of users.
- By creating a dynamic list based on selected conditions.
- By creating a script.

Recipients lists can have both dynamically generated and manually added records of the same type.

Note: You must create at least one recipient list before creating a publication.

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Procedure

1. Navigate to **All** > **Targeted Communications** > **Recipients Lists**.
2. Click **New**.
3. Fill in the fields on the Recipients List form.

Recipients List form

Field	Description
Name	The name of the list.
Type	The type of recipients to include in the list. ○ Contacts (customer_contacts) ○ Internal Users (sys_user) ○ Consumers (csm_consumer) ○ Accounts (customer_account) ○ Business Organizations (business_organizations)
State	The state of the recipient list. ○ **New**: the list has not yet been generated. Click **Refresh Recipient List**. ○ **In Progress**: the list is currently being generated. (You may only see this state when generating a very large list of recipients.) ○ **Complete**: the list has been generated.
Method	The method used to generate the recipient list. ○ **Upload File**: create a list by uploading user information from a selected Excel .xlsx file. ○ **Dynamic Condition**: create a list by selecting conditions in the condition builder or by adding a script. **Note:** To exclude inactive users from receiving emails, use the condition builder to exclude inactive users from the recipients list.
Choose File	If the **Method** is **Upload file**, download an Excel template and then select an .xlsx file that contains the user information. The templates vary based on the entity selected in the **Type** field. For accounts, the template includes columns for sys_id and account number values. For contacts, consumers, and internal users, the template includes columns for sys_id and email values.
Show Script	If the **Method** is **Dynamic Condition**, enable this check box to create a recipients list using a script. Enabling this check box displays the **Script** field.
Script	The script used to create a recipients list.
Table	The table that stores the user information. Depending on the selection in the **Type** field, this field displays: ○ Contact [customer_contact] ○ User [sys_user]

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Field	Description
	○ Consumer [csm_consumer] ○ Account [customer_account]
User Field	The field that references the user record in the User (sys_user) table. For the following types of recipient lists, this is the sys_id: ○ Contacts (customer_contacts) ○ Internal Users (sys_user) ○ Consumers (csm_consumer)
Account Field	The field in the selected table that stores the account information. This field is displayed for the following types of recipients lists: **Accounts**.
Conditions	Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the AND and OR buttons. Delete conditions by clicking the Delete button to the right of a condition.

4. Click **Submit**.
   For recipients lists created by file upload, clicking **Submit** validates the records in the Excel file. Following validation, the system displays a pop-up window with the upload results, including valid and invalid user records.

Edit a recipients list

Modify targeted communication recipient lists using Dynamically Added column in Recipients related list.

Before you begin

Role required: sn_publications.author, sn_publications.admin, sn_customerservice_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

The **Recipients** related list includes the **Dynamically Added** column which displays either True or False, depending on how a record was added:

- True for records that are dynamically generated, either by using the condition builder or by running a script.
- False for records that are added manually, either by using the **Edit** button on the **Recipients** related list or by file upload.

The **Active Communication** column is set to True by default for both dynamically and manually added records. This field indicates whether or not the recipient requires active communication.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Recipients Lists**.
2. Select the desired list.
3. In the **Recipients** related list, click **Edit**.
4. Use the arrows to add or remove records.
5. Click **Save**.

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Create a publication

Create a publication to send articles or emails to internal or external customers. You can specify the content type and include an optional email.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

Two options to consider when creating a publication:

- Include the optional email notification (default)
- Select the type of content: HTML or Wiki

After creating an article, there are two publishing options:

- **Submit:** sets the stage to **Author** and saves the publication record.
- **Send for review:** sets the stage to **Review** and sends the publication to the approver.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Create New Publication**.
2. Fill in the fields on the Publication form.

Publication form

Field	Description
Number	The automatically generated publication number.
Content Type	The type of data included in the publication. Select one of the following: ○ HTML: this content can include Rich Text formatted (RTF) text, images, attachments, and links. Enter the publication data in the **Content** field. ○ Wiki: this content can include plain text. Enter the publication data in the **Wiki** field. The default selection is HTML.
Category	If desired, select a category for the publication. The following categories are available: ○ Defect ○ Outage ○ Information
Recipient Lists	Select a predefined list to target specific customers. Recipient lists are created by the publication author or administrator.
Short Description	A brief description or title of the publication.
Publish Date	Select the publication date as any future date. Publications are sent automatically when the publish date and time are reached.
Expiry Date	Select the expiration date. This date must be at least one day after the **Publish Date**.

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Field	Description
	Publications are automatically expired when the expiry date and time are reached.
Skip Notification	Select the **Skip Notification** checkbox if you wish to skip notification after creating publication. **Note:** On selecting Skip Notification checkbox, the **Email Template** field gets disabled and **Include Attach Links** filed disappears.
Email Template	Search and add an email template from the list or add new email template to send articles to the customers.
Include Attach Links	Include links to any attachments in the email notification preview.
Content	This field appears when you select **HTML** as the **Content Type**. Enter the text of the publication in this field. HTML content can include Rich Text formatted (RTF) text, images, attachments, and links.
Wiki	This field appears when you select **Wiki** as the **Content Type**. Click the Wikitext button and enter the text of the publication in this field. Wiki content can include plain text.

3. Click one of the following options.

Option	Description
Submit	The stage is set to **Author** and the publication record is saved.
Send for Review	The stage is set to **Review** and the publica tion is sent to the approver for review. Approvers can navigate to **Self-Service** > **My Approvals** to see a list of review requests.

Publish a publication

Automatically publish a publication with an optional email notification to send to customers.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

Publications are automatically published at the date and time selected in the **Publish Date** field on the Publication form. When creating a publication, set the **Publish Date** and the **Expiry Date** fields to control when the publication is automatically published and expired.

Note: A UI action to manually publish a publication is not available out of box. If needed, the system administrator can Create a UI action and add it to the Publication form.

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When creating a publication, you can also include an optional email notification that is sent to all recipients in the recipients list when the publication is published. In this email notification, all recipients are included in a **bcc** list to maintain privacy.

Note: To exclude inactive users from receiving emails, use the condition builder to exclude inactive users from the recipients list.

Procedure

1. Navigate to **All** > **Targeted Communications** > **Active Publications**.
2. Select the desired publication.
3. View the date in the **Publish Date** field.
   The system automatically publishes the publication on this date and time and sends an email notification to the recipients in the recipients list.

   Note:
   - If the system administrator has configured a UI action, you can use this UI action for manually publishing the publication.
   - For more info, see Email templates.

Create a recurring publication

Review publications to either accept or reject them. You must have the publication's approval role to review the publication. If the publication is not reviewed before the Publish Date, the publication is rejected.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

You can specify the recurrence interval and the recurrence start and end date. The number of copies that are created are based on these settings and appear in the **Publications** related list on the original publication form. Each copy has a different publish date, which is based on the interval. Each copy gets reset to the **Author** state and each one goes through its own workflow.

Procedure

1. Do one of the following:
   - Navigate to **Targeted Communications** > **Active Publications**, open the desired publication, and click the **Setup Recurrence** related link.
   - Navigate to **Targeted Communications** > **Recurrences** and click **New**.
2. Fill in the fields on the Recurrence form.

Recurrence form

Field	Description
Short Description	A brief description or title of the publication.
Publication Template	The number of the publication being used as a template.

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Field	Description
	○ If you clicked the **Setup Recurrence** related link, this field displays the original publication number. ○ If you clicked **Recurrences** in the Targeted Communications menu, select a publication from the Publications list.
Recurrence Start	Select a date for the first occurrence of the recurring publications.
Recurrence End	Select a date for the last occurrence of the recurring publications.
Recurrence Interval	Select an interval for the recurring publications: ○ Daily ○ Weekly ○ Biweekly ○ Monthly ○ Custom
Custom Interval in Days	This field appears when you select **Custom** as the **Recurrence Interval**. Enter the number of days for the interval.

3. Click **Submit**.
   The recurring publications are created based on the selected dates and the recurrence interval and the stage for each copy is set to **Author**. The copies appear on the **Publications** related list on the original publication form, as well as on the Active Publications and the Draft Publications lists. From any of these lists you can open each publication and change the information as necessary. Each copy lists the publication template number in the **Recurrence** field.

   A record of the recurrence appears on the Recurrences list.

Preview an email notification

Before sending a publication, authors or administrators can preview the email notifications, reviewing the recipient list, subject information, and publication content.

Before you begin

Role required: sn_publications.author or sn_publications.admin

About this task

Users can preview the following information for an email notification when the Case Management Core plugin (com.sn_customerservice) is installed:

- The recipient list
- The subject of the publication
- The text of the publication and any attachments.

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**

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2. Select the desired publication.
3. Click the **Preview Target Email** related link.
4. View the email notification in the Notification Preview window.
5. If desired, view the publication on the customer portal by clicking the link in the body of the email.
6. Close the Notification Preview window.
   Once the publication has been published, the customers in the recipient list should receive the email.

Update a publication

You can make changes to a publication that is in the **Author** or **Review** stages.

Before you begin

Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Open the desired publication.
   The stage of the publication must be either **Author** or **Review**.
3. Make the desired changes.
4. Click **Update**.

Send a publication for review

Send publications for review, either the author or administrators, from the Author stage, triggering a transition to the Review stage. Approvers are automatically added to the Approvers related list.

Before you begin

Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Select a publication in the **Author** stage.
3. Click **Send For Review**.
   The publication stage is set to **Review** and the approvers are added to the **Approvers** related list on the Publication form.

   Approvers can navigate to **Self-Service** > **My Approvals** to see a list of review requests.

Review a publication

Users with the publications approver role that have been added as approvers to the publication workflow can review a publication.

Before you begin

Role required: sn_publications.approver or sn_customerservice_manager

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About this task

After reviewing, an approver can either accept or reject a publication. If an approver does not review a publication before the **Publish Date**, the publication cannot be approved. The **Approve** button is not displayed and the approver sees a message that the publish date and time has passed. The approver can only reject the publication, which returns it to the **Author** stage.

The **Approvers** related list displays a list of approval tasks and includes most recent comment from each approver.

Note: Delegate approval is not available in the Targeted Communications application.

Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select a publication for review from the Approvals list that has a state of **Requested**.
3. Review the publication summary at the bottom of the approval form.
4. Add review comments to the **Comments** field.
5. Click one of the following options.

Option	Description
Approve	The review state changes to **Approved** on the Approvals list and the publication stage is set to **Ready To Publish**. For other approvers of this article, the review state changes to **No Longer Required**.
Reject	The review state changes to **Rejected** on the Approvals list and the publication stage is set to **Author**.

View approvers for a publication

Access and review the assigned approvers for a publication sent for review in Targeted Communications.

Before you begin

Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to one of the following modules:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Open the desired publication.
3. Click the tab for the **Approvers** related list.
   The Approvers list includes the users with the publications approver role that have been added as approvers to the publication workflow.

Track a publication

Access a list of recipients for a publication and see which recipients have viewed the content.

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Before you begin
Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to **All** > **Targeted Communications** > **Active Publications**.
2. Open the desired publication.
3. Click the **Publication Recipients** related list.
   For each recipient on this list, you can see if the customer has viewed the article.

Expire a publication

Expire a published article before it reaches the **Expiry Date**.

Before you begin
Role required: sn_publications.author or sn_publications.admin

Procedure

1. Navigate to **All** > **Targeted Communications** > **Active Publications**.
2. Select an article that has been published.
3. Click **Expire**.
   The publication **Expiry Date** is set to the current date. The publication is removed from the Active Publications list and appears on the Expired Publications list.

Cancel a publication

Cancel a pending publication before it reaches the publish date.

Before you begin
Role required: sn_publications.author or sn_publications.admin

About this task
You can cancel a publication in any of the following stages: **Author**, **Review**, or **Ready to Publish**.

Procedure

1. Navigate to one of the following:
   - **Targeted Communications** > **Active Publications**
   - **Targeted Communications** > **Draft Publications**
2. Select the desired publication.
3. Click **Cancel**.
   The stage of the publication changes to **Cancelled**.

View a publication

Access the details of a publication and review them using the Targeted Communications menu.

Before you begin
Role required: sn_customerservice.customer

Note: To view a published publication, see View a publication on the Customer Service Portal

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Procedure

1. Navigate to **All** > **Targeted Communications** > **Publications**.
2. Select a publication from the Publications list.

Configure special handling notes

Use special handling notes to bring important case information to an agent's attention.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

Configure the desired entity tables to use special handling notes and then configure the corresponding forms to display either the Special Handling Notes list or pop-up window.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Case Management category, select the Special Handling Notes task.
   Configuring special handling notes includes the following steps.

Special Handling Notes configuration steps

Task	Description
Configure an entity table to use special handling notes	Configuring an entity to use special handling notes adds the **Create Special Handling Notes** related link to the corresponding entity form.
Configure a form to show special handling notes in a list or pop-up window	Configure a form to display special handling notes in either a list or a pop-up window.
Configure the necessary properties to display special handling notes	Configure properties that determine the frequency and the number of special handling notes that are displayed.

4. To perform the task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Special handling notes

Configure an entity table to use special handling notes

Configure an entity table to use special handling notes.

Before you begin

Role required: sn_shn.admin

About this task

Configuring an entity to use special handling notes adds the **Create Special Handling Notes** related link to the corresponding form.

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Procedure

1. Navigate to **All** > **Special Handling Notes** > **Configuration**.
2. Click **New**.
3. Select a table in the **Table name** field.
4. If desired, select one or more **Related Fields**.
   You can also display notes from related entities by including those fields in the configuration. For example, you can display notes for the account and contact associated with a customer service case by selecting the **Account** and **Contact** fields on the Case form.
5. Click **Submit**.
   The configuration is added to the Special Handling Configuration list.

Configure a form to show special handling notes

Display special handling notes on a form, such as the Case form, in either a form list or a pop-up window.

Before you begin

Role required: sn_shn.admin

Procedure

1. Navigate to a form such as the Case form.
2. Right-click the form header and select **Configure** > **Form Layout**.
   The system displays a pop-up window that gives you the choice to use Form Builder or continue with the following steps. Selecting **Try Form Builder** opens the Form Builder tool in a new window. For more information, see Accessing Form Builder.
3. Select **Not Now** on the pop-up window.
4. Select one or both of the following choices from the **Available** column and move it to the **Selected** column.
   - **Special Handling Notes List**
   - **Special Handling Notes Pop Up**
5. Select **Save**.

Related topics

Special handling notes

Configure special handling notes properties

Configure the necessary properties to display special handling notes.

Before you begin

Role required: sn_shn.admin

Procedure

1. Navigate to **All** > **Special Handling Notes** > **Properties**.
2. Configure the following properties.

Option	Description
Display special handling notes only once per session	Special handling notes are displayed each time you access a record. Enable this proper

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Option	Description
	ty to display special handling notes only once per session.
Maximum number of notes displayed in the Special Handling Notes pop-up window	Increase or decrease this number as desired. The default is 20 alerts.
Width of the Special Handling Notes pop-up window in pixels	The width of the pop-up window in pixels. The default width is 500. If you specify less that 300, the window automatically uses the de fault width.

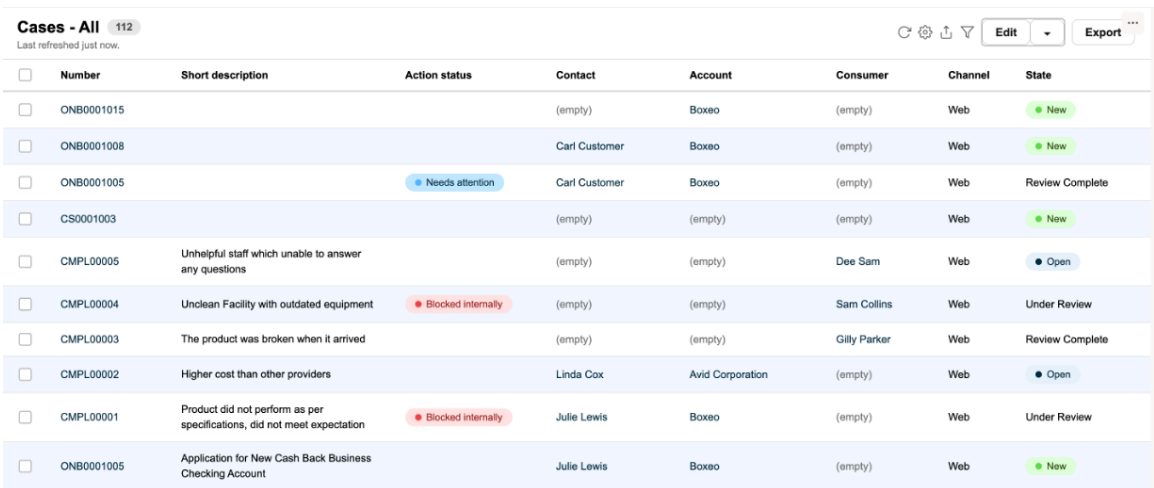
3. Click **Save**.

Case action status

The case action status feature displays the status of cases in the Case list. With this feature, customer service agents can easily identify cases that need attention.

The case action status feature provides visual indicators in the **Action status** column on the My Cases and My Open lists to highlight case status. In addition to the colored indicators, the **Action status** column also displays a brief status message.

Action status column on the Case list



Number	Short description	Action status	Contact	Account	Consumer	Channel	State
ONB0001015			(empty)	Boxeo	(empty)	Web	New
ONB0001008			Carl Customer	Boxeo	(empty)	Web	New
ONB0001005		Needs attention	Carl Customer	Boxeo	(empty)	Web	Review Complete
CS0001003			(empty)	(empty)	(empty)	Web	New
CMPL00005	Unhelpful staff which unable to answer any questions		(empty)	(empty)	Dee Sam	Web	Open
CMPL00004	Unclean Facility with outdated equipment	Blocked internally	(empty)	(empty)	Sam Collins	Web	Under Review
CMPL00003	The product was broken when it arrived		(empty)	(empty)	Gilly Parker	Web	Review Complete
CMPL00002	Higher cost than other providers		Linda Cox	Avid Corporation	(empty)	Web	Open
CMPL00001	Product did not perform as per specifications, did not meet expectation	Blocked internally	Julie Lewis	Boxeo	(empty)	Web	Under Review
ONB0001005	Application for New Cash Back Business Checking Account		Julie Lewis	Boxeo	(empty)	Web	New

Actionable case flows

The case action status feature uses actionable case flows to automatically determine the action status for customer service cases. These flows create and resolve blocking tasks for different case-related actions and automatically update the action status indicators. Certain agent actions trigger these case flows, which in turn create and resolve the blocking tasks.

Customer service agents and managers can also manually set the action status for cases by enabling the **Needs Attention** field on the Case form.

Blocking tasks

A blocking task is something that prevents an agent from making progress toward case resolution. For example, a case might have one or more open related case task records or be waiting for customer feedback.

Certain agent actions trigger case flows that create and resolve blocking tasks for customer service cases. These tasks determine the case action status. Additionally, there are actions that

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resolve these blocking tasks, such as the customer responding to an agent's question or an internal user resolving a problem task. For more information, see .

Related topics

Case action status

Configure case action status

Activate Case Action Status

Activate Case Action Status

Activate the Case Action Status application to use the case action status feature. You can install the Case Action Status application (com.snc.csm_action_status) if you have the admin role.

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 .
- Review the Customer Service Case Action Status application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Case action status provides a Customer Service-specific application of the Action Status Automation feature, which tracks blocking tasks created for customer service cases and updates the action status indicators.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Service Case Action Status application (com.snc.csm_action_status) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Related topics

Case action status

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Activate Action Status Automation

You can install the Action Status Automation application (com.sn_action_status) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Action Status Automation application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Action Status Automation:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Action Status Automation application (com.sn_action_status) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure case action status

The case action status feature displays the status of cases in the Cases list. Customer service agents can use this feature to easily identify cases that need attention and quickly prioritize their work.

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Before you begin
Role required: csm_guided_setup_user and admin

About this task
Visual indicators in the Action Status column on the case list highlight case status:

- **Needs attention**: A blue indicator highlights cases that require attention, such as cases that have been updated by customers or internal users and are waiting for input or review. A blue indicator highlights cases that need attention.
- **Blocked**: A red indicator highlights cases that are blocked, such as cases that have open related task records or are waiting for customer feedback.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Case Management category, view the list of tasks to configure the feature.

Case Action Status

Task	Description
Activate Case Action Status	Activate the Case Action Status plugin (com.snc.csm_action_status) plugin to enable the case action status feature.
Configure actionable case flows	Enable or disable the actionable case flows that are provided with the Case Action Status plugin.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics
Case action status

Actionable case flows
Actionable case flows contain predefined user actions that automatically create and resolve blocking tasks for customer service cases.

The Case Action Status plugin provides several actionable case flows that create and resolve blocking tasks for different case-related actions. These flows are enabled by default. If you don't want to create blocking tasks for a specific action, disable the associated flow.

To view these flows, navigate to **Customer Service** > **Administration** > **Actionable Case Flows**.

Flow Designer actions

Case flows use the following predefined Flow Designer actions:

- Add Blocking Task
- Inactivate Blocking Task
- Set Needs Attention Flag

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Flows for customer service cases

The case action status feature provides the following flows for customer service cases.

- Create blocked by record if case needs customer information
- Create blocked by record if Case Task is associated with case
- Create blocked by record if Change Request is associated with case
- Create blocked by record if SC Request is associated with case
- Create blocked by record if Work Order is associated with case
- Create blocked by record if Incident is associated with case
- Create blocked by record if Problem is associated with case
- Resolve blocked by record if Case Task is closed
- Resolve blocked by record if Change Request is closed
- Resolve blocked by record if Incident is closed
- Resolve blocked by record if Problem is closed or Fix is communicated
- Resolve blocked by record if Problem is closed or Fix/Workaround is communicated
- Resolve blocked by record if SC Request is closed
- Resolve blocked by record if user information is provided for case
- Resolve blocked by record if Work Order is closed or cancelled
- Set Needs Attention if additional comments are added by others
- Update case when blocked by record is created
- Update case when Needs attention field is toggled

Flows for customer service orders

The case action status feature provides the following flows for customer service orders.

- Create blocked by record if order case needs customer information
- Resolve blocked by record if user information is provided for order case
- Set Needs Attention if additional comments are added by others on order case
- Update order case when Needs attention field is toggled

Flows for problem records associated with a case

If a problem is associated with a case with the **Need task resolution** blocking reason, a case flow is provided to resolve the blocking task when a fix is communicated or the problem record is closed or cancelled.

If a problem is associated with a case with the **Need PRB workaround** blocking reason, a case flow is provided to resolve the blocking task when a workaround is provided or the problem record is closed or cancelled.

Configure actionable case flows

The Case Action Status plugin provides several actionable case flows that create and resolve blocking tasks for different case-related actions.

Before you begin
Role required: admin

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About this task

The actionable case flows included with the Case Action Status plugin are enabled by default. If you do not want to create blocking tasks for a specific action, you need to disable the associated flow. For more information about the case flows included with the plugin, see Actionable case flows.

> **Note:** The Case Action Status plugin provides case flows that create and resolve blocking tasks for problems associated with cases. To get complete functionality, you must also activate the Customer Service with Service Management plugin (com.sn_cs_sm). For more information, see Integrate with Service Management.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Actionable Case Flows**.
2. Review the list of case flows.
3. Set the **Active** field to false for the desired case flows.

Related topics

Case action status

Blocking tasks

Certain agent actions trigger case flows which create and resolve the blocking tasks for customer service cases. These tasks determine the case action status.

When an agent performs certain actions, such as asking a customer for more information or associating a problem with a case, the system:

- Adds a blocking task to the case. This task appears on the Case form in the **Blocked by** form section.
- Updates the **Action Status** field on the Case form and Case list.

> **Note:** A blocking task is something that prevents an agent from making progress toward case resolution. For example, a case might have one or more open related task records or be waiting for customer feedback.

Additionally, there are actions that resolve these blocking tasks, such as the customer responding to an agent's question or an internal user resolving a problem task. When one of these actions occur, the system:

- Updates the status of the blocking task on the Case form.
- Updates the **Action Status** field on the Case form and Case list.
- Enables the **Needs Attention** field on the Case form.

Actions that create blocking tasks

The following actions create blocking task for customer service cases:

- The agent sets the state of the case to **Needs More Information**.
- The agent associates one of the following to the case:
  - Problem
  - Request
  - Change
  - Incident

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- Case task
- Work order

Actions that resolve blocking tasks

The following actions resolve the blocking tasks for customer service cases:

- A customer provides the requested information.
- A fix or a workaround is associated with a related problem record.
- A related problem, request, change, or incident record is resolved.
- A related case task or work order is closed or cancelled.

Needs attention field

When the **Needs attention** field on the Case form is enabled, the **Action Status** column on the Case list displays a blue indicator.

The **Needs attention** field is enabled automatically when:

- A blocking task for a case is resolved.
- A customer or someone other than the case owner comments on a case.
- A work note is added to a case that is a child of a major case.

Customer service agents and managers can manually enable the **Needs attention** field if information is required from customers or internal users. This field can be disabled only by the agent assigned to the case or by the customer service manager or admin.

Requesting additional information from a customer

When an agent requests additional information from a customer, the system enables the **Needs attention** field and sets the **Action status** field to Needs attention.

If an agent needs to request additional information from a customer for a second time on the same case, be sure to clear the **Needs attention** field on the Case form before requesting the information. This ensures that the status updates correctly.

Case action status and major issue management

When using the case action status feature with major issue management, the following actions enable the **Needs attention** field for a major case:

- A customer provides comments for a case that is a child of a major case.
- An agent adds a work note to a case that is a child of a major case.

Blocked by related list

Blocking tasks that are created for a case are added to the **Blocked by** related list. Each blocking task is assigned one of the following blocking reasons:

- Need information from the customer
- Need task resolution
- Need PRB workaround
- Other

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Note: When a problem is associated with a case and a blocking task is created, the blocking reason is set to **Need task resolution**. If necessary, the agent can change this reason to **Need PRB workaround**.

When a blocking task is resolved:

- The **Unblocked By** field displays the user who performed the unblocking action.
- The **Unblocked On** field displays the date that the blocking task was resolved.

Blocking Tasks table

Records that have the blocking tasks are stored in the Blocked By table [sn_action_status_blocked_by]. Records are periodically removed from this table. Six months after a blocked record is closed, the entries in the Blocked By table related to the blocked record are removed.

Case action status analytics

The Customer Service Manager dashboard displays the percentage of the case backlog that is waiting for an agent response, customer input, or a response for other users.

The dashboard includes the **Open Backlog - Blocked** widget which breaks down the remaining work to show cases that are with the following users:

- Agent
- Customer
- Other Internal Stakeholder

As blocking tasks for a case get created and resolved, this dashboard widget tracks the case time spent with each of these users. The breakdown is set for:

- Blocked internally: Caused by an open task, which can be an incident, problem, change request, or case task. This resolves when the task closes.
- Blocked by customer: Waiting for the customer to respond before the agent can act.
- Blocked internally and by customer: Both conditions are true at the same time: there's an open internal blocking task and the case is waiting for the customer to respond.

Case action status logging

Logging for the case action status feature uses a metric definition to view information about blocking tasks associated with customer service cases.

Defined metrics can track how long a specific field holds a certain value. The **Case Actor Duration** metric definition logs the events related to case blocking tasks.

When a case blocking task is created or resolved, the system logs the information. This information can be used to report on the duration of the case with the customer, the agent, or other internal stakeholders.

As a case gets blocked and unblocked by a customer or an internal user, the metric definition tracks the duration of the case with each of these actors.

The metrics include:

- Case number
- Metric definition
- Value

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  - Needs attention
  - Blocked by customer
  - Blocked internally and by customer
- Start and end times
- Duration

To access the **Case Actor Duration** metric definition, navigate to **All** > **Metrics** > **Definitions** and select the definition from the list. For more information about metric definitions, see the following topics:

- Metrics
- Define a metric

Create cases as a proxy contact

The proxy contact role (Customer Proxy Contacts, sn_csm_proxy_cont) enables employees to create cases for customer accounts and contacts. Employees can also be proxy case contacts on behalf of customers.

Assign the proxy contact role (sn_csm_proxy_cont) to employees in your company who are not fulfillers or do not have other CSM-specific roles.

Note: This role requires licensing for access to CSM applications. The proxy contact can't co-exist with the contributor roles.

Install the Customer Proxy Contacts to use this functionality.

Employees with the proxy contact role can do the following:

- Create cases on behalf of customers by email, phone, chat, Virtual Agent, and from the Customer Service Portal.
- Create requests on behalf of customers from the Customer Service Portal.

When creating a case, the employee can select a customer contact or a partner contact as the case contact. The employee is also added to the case as the internal contact.

From the Customer Service Portal, employees can do the following for the cases where they are the internal contact:

- View a list of cases.
- View case details.
- Add comments or attachments to a case.
- Accept or reject a case resolution.
- View a list of related work orders.
- Check the status of a case using Virtual Agent.

Customer service agents can create cases and designate an employee with the proxy contact role as the internal contact.

- From CRM Workspace, agents can create cases for employees from interaction records.
- From connect chat sessions with employees, agents can create cases that add the employee to the **Internal contact** field on the Case form.

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Plugin information

Activate the Customer Proxy Contacts (com.snc.csm_proxy_contacts) plugin to enable this feature. This plugin adds the following to Customer Service Management:

- The Customer Proxy Contacts (sn_csm_proxy_cont) role.
- The ProxyContactHelper script include.
- The **Internal contact** field on the Case form.
- The **Opened for** field on the Interaction form.

Note: You need to configure the Interaction form to display the **Opened for** field and the Case form to display the **Internal contact** field.

Configure the Customer 360 ribbon component in CRM Workspace

With the workspace administrator role (workspace_admin), you can configure the Customer 360 ribbon component to display the internal contact for a case.

- If the **Contact** field (the primary field) is populated on the Case form, the Customer 360 component displays the contact information.
- If the **Consumer** field (the secondary field) is populated on the Case form, the Customer 360 component displays the consumer information.
- If the **Internal contact** field (the tertiary field) is populated on the Case form, and the **Contact** and **Consumer** fields do not contain any data, the Customer 360 component displays the internal contact (employee) information.

Internal contact field on Case form

When an employee with the sn_csm_proxy_cont role creates a case for a customer account, the **Internal contact** field on the Case form is populated with the employee's name. This field determines case visibility for the employee. From the Customer Service Portal, employees can see cases that they have created and are identified as the internal contact.

Note: This field appears on the Case form in both the Core UI and CRM Workspace.

When an agent creates a case, they can select an employee with the sn_csm_proxy_cont role in the **Internal contact** field.

Creating a case from the Customer Service Portal

An employee with the proxy contact role can create a case for a customer from the Customer Service Portal. As part of creating a case, the employee:

- Selects an account.
- Selects a contact from the available contacts for the account.
- Selects an asset or product for the account.
- Enters a subject and description for the case.

When the case is created, the employee is added to the **Internal contact** on the Case form.

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Creating a case from an interaction record

An agent can create a case for an employee by clicking **Create Case** on the Interaction form. On the resulting Case form, the **Internal contact** field:

- Is set to the value from the **Opened for** field if the employee has the proxy contact role.
- Remains blank if the user in the **Opened for** field does not have the proxy contact role.

Creating a case via email

Employees can create a case by sending an email to the inbound email address. When the email is received, the system checks to see if the user has the proxy contact role.

- If yes, the case is created and the employee is added to the **Internal contact** field. The content of the email is logged in the case activity stream.
- If no, the case is not created.

Initiating a chat from the Customer Service Portal

Employees with the proxy contact role can initiate a chat with an agent directly from the Customer Service Portal or using Virtual Agent. This creates a chat request card with the employee's name in the agent's inbox.

- *`CRM Workspace`*: when the agent accepts the chat, the interaction record displays the employee name in the **Opened for** field.
- *`Core UI`*: when the agent accepts the chat and creates a case a case from the chat session, the employee name is added to the Case form in the **Internal contact** field.

Check the status of a case using Virtual Agent

Employees with the proxy contact role can use Virtual Agent to check the status of a case where they are the internal contact.

After logging in to the Customer Service Portal and initiating Virtual Agent, use the options available with the **Check Case Status** topic.

Viewing work orders

From the Customer Service Portal, employees with the sn_csm_proxy_cont role can see work orders for the cases where they are the internal contact. Employees can also add attachments to the work orders.

In the portal header, click **Support** > **Work Orders**.

Employee notifications

The system sends an email notification to the employee in the **Internal contact** field on the Case form when:

- The case is opened or closed.
- Comments are added to the case.

Automatically close customer service cases

Customer service cases in the **Resolved** state can be closed automatically if customers don’t act.

This feature uses the **Auto Close Resolved Cases** Flow Designer flow.

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Note: This flow isn't active by default.

The **Auto Close Resolved Cases** Flow Designer Flow identifies cases in the **Resolved** state that are waiting for a customer response and takes the following actions:

- Sends a reminder notification to the customer after five days with no response that the case is pending solution acceptance.
- Closes the case and sends a reminder notification to the customer after 10 days that the case has been auto-closed.

The notifications are added to the **Additional comments** field on the Case form.

The administrator can enable the **Auto Close Resolved Cases** flow and configure the timing of the reminder notifications. The default settings include two notifications that are sent at 5 days and 10 days after a case has been resolved. The administrator can also create additional notifications to the flow.

The administrator can also create a configuration that enables both the system and agents to exclude cases from auto-closure.

Using the Auto Close field on the Case form

Customer service agents can use the **Auto Close** field on the Case form to exclude cases from auto-closure. This field is hidden by default. To use this field, configure the Case form to display the **Auto Close** field.

Configuring business rules for auto closure

The administrator can configure business rules to enable or disable the **Auto Close** field on the Case form.

Rules for Auto Close on the Case form

Business rule	Description
Mark for Auto Close	Use this business rule to configure when the system sets the **Auto Close** field to true. The default configuration is as follows: • The case status is Resolved. • The **Needs attention** field on the Case form is false. • The case isn't escalated. • The account isn't escalated.
Clear Auto Close	Use this business rule to configure when the system automatically sets the **Auto Close** field to false. By default, the case status returns to **Open** if the solution is rejected.

Related topics

Workflow Studio

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Notifications for resolved cases

Customers receive notifications about resolved cases that are automatically closed if no action is taken.

When an agent proposes a solution for a customer service case, the customer has a time window in which to accept or reject the solution. If the customer doesn't take action within this window, the case is automatically closed.

The system administrator can configure the settings for the notifications that are sent to the customer. The default settings include two notifications that are sent at 5 days and 10 days after a case has been resolved.

- After 5 days, the customer receives a reminder message about the resolved case on the Customer Service Portal: **This case is pending solution acceptance. It will be auto closed if you do not take action.**
- If the customer doesn't take any action after 10 days, the system automatically closes the case and adds the following message to the case: **This case was auto closed.**

This feature uses the **Auto Close Resolved Cases** Flow Designer flow. For more information, see Automatically close customer service cases.

Note: The **Auto Close Resolved Cases** flow isn't active by default.

Install the Customer Proxy Contacts

You can install the Customer Proxy Contacts application (com.snc.csm_proxy_contacts) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Customer Proxy Contacts application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Proxy Contacts application (com.snc.csm_proxy_contacts) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

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4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Configure auto close resolved cases

Use the auto close resolved cases feature to close cases automatically in the Resolved state if customers choose not to take action.

Before you begin

Role required: csm_guided_setup_user and admin

About this task

Enable this feature by activating the **Auto Close Resolved Cases** Flow Designer flow. You can also create a configuration that enables both the system and agents to exclude cases from auto closure.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Case Management category, view the list of tasks to configure the feature.

Auto Close Resolved Cases

Task	Description
Activate Auto Close Resolved Case Flow	Activate the Auto Close Resolved Cases Flow Designer Flow, which identifies cases in the Resolved state that are waiting for a customer response and takes the following actions: ○ Sends a reminder notification to the customer after 5 days with no response that the case is pending solution acceptance. ○ Closes the case and sends a reminder notification to the customer after 10 days that the case has been auto closed.
Configure Business Rules for Auto Close Field	Configure the following business rules to enable or disable the **Auto Close** field on the Case form: ○ Mark for Auto Close ○ Clear Auto Close
Configure Auto Close Flag	The **Auto Close Resolved Cases** Flow Designer flow uses the **Auto Close** flag to exclude cases from auto closure. This flag is hidden by default. To use this flag, configure the Case form to display the **Auto Close** field.

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4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Automatically close customer service cases

Case and account escalation

Use the escalation feature to highlight specific cases or accounts and raise awareness of important customer issues.

Escalating a case or an account provides the following benefits:

- Increases attention about a customer issue.
- Facilitates communication about that issue.
- Provides a way to track progress toward a resolution.

Users with the escalation requester role can escalate a case or an account by selecting the **Escalate Case** related link on the case or account form.

Case and account escalation differences

While the escalation process is similar for cases and accounts, there are some important differences to note.

- Case escalations: A customer service agent typically manages a case escalation and works directly with the escalated case to resolve the issue.
- Account escalations: An escalation manager typically manages an account escalation, which can include multiple associated cases, and records details in the escalation record.

For more information, see Case and account escalation differences.

Configuring case and account escalation

The following table includes an overview of case and account escalation configuration tasks. Users with the system administrator role can perform these tasks.

Case and account escalation configuration tasks

Task	Description
Configure escalation management	Configure case and account escalation using Customer Service Management guided setup.
Create a case or account escalation template	Escalation templates determine how an escalation request is processed, including the type of escalation and an optional approval process.
Create a case or account escalation severity	Create definitions for different levels of escalation severity and select color indicators to highlight escalated cases and accounts in the user interface.

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Using case and account escalation

The following table includes an overview of case and account escalation user tasks.

Case and account escalation user tasks

Task	Description
Escalate a case or an account	Escalate cases or accounts, either on behalf of customers or for internal purposes. Escalating a case or account creates an associated escalation record. Role required: escalation requester
Manage an escalated case or account	Manage a case or account through the escalation process using the escalation record. The system identifies cases and accounts on lists and forms with color indicators that correspond to the escalation severity: red (high) or orange (medium). Role required: • Customer service agent • Escalation manager
De-escalate a case or an account	De-escalate cases or accounts when the cause of the escalation is resolved. Role required: de-escalation requester
Use an optional escalation approval process	Include an optional approval step for approvers to review a request and either approve or reject an escalation. When using the optional approval step, the system creates the escalation record upon approval and associates it with the case or account.

Configure escalation management

Escalating a case or account raises awareness about important customer issues, facilitates communication, and enables users to track progress towards a resolution.

Before you begin

Role required: csm_guided_setup_user, sn_crm_escalation_admin, sn_crm_foundation_admin or admin

About this task

An escalation provides increased attention to a customer issue and provides a way to track the progress made in resolving the issue. Create escalation templates and severity definitions to control the escalation process.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Case Management category, view the list of tasks to configure the feature.

Escalation Management

Task	Description
Create escalation templates	An escalation template defines how an escalation request is processed and includes: ○ Type of escalation request (case or account). ○ Approval group and subflow, required when the request goes through an approval process. This triggers the default escalation approval flow. ○ Escalation watch list.
Create escalation severity definitions	The escalation severity defines the type of escalation and the color used to represent the cases and accounts of this escalation severity in the user interface.

4. To perform a task, click **Configure**.

   The page in your instance where the configuration is completed is opened.

Related topics

Case and account escalation

Create a case or account escalation template

Create a template for each type of case or account escalation.

Before you begin

Role required: sn_crm_foundation_admin or sn_crm_escalation_admin or admin

About this task

An escalation template determines how an escalation request is processed and includes the type of escalation (case or account); an approval list or workflow (if approval is required), and an escalation watch list.

Procedure

1. Navigate to **All** > **Customer Service** > **Escalation Templates**.
2. Click **New**.
3. Fill in the fields on the Escalation Template form, as needed.

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Escalation Template form fields

Field	Description
Name	The name of the escalation template.
Skip Escalation Approval	Enable this check box to skip the need for approval. If skipped, escalations are automatically approved.
Use Default Approval	Enable this check box to use the default approval flow (**Escalation - Approval**) provided with the escalation feature. If using the default approval flow, select an **Approval Group**.
Escalation Approval Flow	Staring with the Zurich release, the **Escalation Approval Flow** field is added to the Escalation Template (sn_customerservice_escalation_template) table. Existing customers with customizations can still view the legacy **Escalation Approval Workflow** field. You can continue using your current escalation workflows or migrate to the new flows, depending on your customizations. **Note:** As per of this update: ○ The legacy Escalation-Approval workflow has been migrated to the low-code flow designer. ○ The Escalation Master–Approval workflow has been converted into a business rule. Existing customers who haven't customized these workflows should migrate to the new equivalent base system flows. Customers with customized versions might continue using them, but are encouraged to transition to the updated flows. Custom workflows remain supported, and customers can continue to create them as needed. However, any new business requirements must be implemented using the new or updated flow-based framework, rather than legacy workflows.
Add Case Assignment Group Manager to Approvers	For case escalation, enable this check box to add the manager of the case assignment group to the list of approvers.
Approval Group	If the **Use Default Approval** check box is enabled: ○ For the **Case Escalation** type, you can select an additional approval group. ○ For the **Account Escalation** type, you must select an approval group. **Note:** If there are no approvers, escalation requests are automatically approved.
Escalation Approval Workflow	The workflow used to approve escalation requests. Use the default **Escalation-Approval** flow or select a different flow.
Type	The type of escalation: ○ Case Escalation ○ Account Escalation

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Field	Description
Escalation Watch List	Add users to the escalation template watch list. These users receive notifications for all escalations that use this escalation template. For an account escalation, the account team is automatically added to the watch list. **Note:** Users can also be added to the watch list on the escalation record.

4. Click **Submit**.

Create a case or account escalation severity

The escalation severity defines the type of escalation and the color used to represent the cases and accounts of this escalation severity in the user interface.

Before you begin

Role required: sn_crm_foundation_admin or sn_crm_escalation_admin or admin

About this task

The assigned severity allows agents to easily identify escalated cases and accounts on lists and forms. The escalation feature provides two escalation severity definitions:

- **High Severity**: escalated records are highlighted in red.
- **Medium Severity**: escalated records are highlighted in orange.

The user interface determines which fields are highlighted for escalated cases and accounts:

- **Agent Workspace**: Field indicators and field highlights appear on the **Short description** field for escalated cases and on the **Name** field for escalated accounts.

  Note: You can move indicators and highlights to any field that is not a hyperlinked field.

- **Platform interface**: Escalated case and account numbers are indicated with a colored dot on a list and a colored background on a form.

Procedure

1. Navigate to **All** > **Customer Service** > **Escalation Severity**.
2. Click **New**.
3. Enter a **Name** for the severity.
4. In the **Style** field, enter a color.
   To configure additional escalation severity records, the system administrator must configure a new style with the desired color. For more information, see Highlight list fields.
5. Click **Submit**.

Case and account escalation differences

An overview of the differences between case escalations and account escalations.

- **Case escalations**: A customer service agent typically manages a case escalation and performs most of the problem resolution work, which is recorded in the case record. For case escalations, the escalation record is used primarily for status reporting purposes. The escalation SLA is also associated with the case record rather than the escalation record because that is where the agent provides regular updates.

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- **Account escalations**: An account escalation manager typically manages an account escalation because it is associated with multiple underlying cases. An account manager works with multiple case owners to resolve the customer escalation and uses the escalation record to consolidate the status of the associated cases and provide regular updates. Therefore, the SLA is associated with the escalation record.

Case and account escalation differences

Feature	Case Escalation	Account Escalation
Relationships	Corresponds one-to-one to a case.	Corresponds one-to-one to an account. Users can link specific cases to the escalation record to indicate which cases are causing the escalation.
Templates	Uses case escalation templates. **Note:** When you select Case Escalation in the **Type** field, an additional checkbox field appears for **Add Case Assignment Group Manager to Approvers**.	Uses account escalation templates.
Approval workflow	Includes an option to automatically add the manager of the case assignment group to the approver list when using the default approval workflow.	Does not include an option to automatically add the manager of the case assignment group to the approver list because an account escalation can be associated with multiple cases.
Escalation assignment	Does not include a separate assignment. A case escalation corresponds to an individual case and the customer service agent manages the escalation.	Includes a separate assignment. An account escalation can have multiple associated cases that are assigned to different agents so the escalation record includes an **Assigned to** field. An account escalation is typically assigned to an escalation manager because account escalations are typically more serious than case escalations.
Watch list	Does not include an option to automatically add an account team to the escalation watch list.	Includes an option to automatically add an account team to the escalation watch list.

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Case and account escalation differences (continued)

Feature	Case Escalation	Account Escalation
Escalation updates added to case	Updates to the escalation record are also added to the **Work notes** field on the corresponding case record.	Updates to the escalation record are not added to the account record.
SLAs	The case escalation SLAs provided with the escalation feature are attached to the case.	The account escalation SLAs provided with the escalation feature are attached to the account.

Case and account escalation process

The case and account escalation process follows several steps from request to completion.

1. Your users with the escalation requester role request an escalation for a case or account. As part of the request, you can provide the following information:
   - The reason for the request
   - Justification for the escalation
   - The escalation severity
   - The escalation template
   - The watch list for the escalation
2. If approval is required for an escalation request, approvers from the selected approval group review and approve or reject the escalation request. The chosen approval subflow then updates the approval status accordingly.
3. Following approval, the agent manages the escalation as it progresses using the escalation form. For example, the agent can add users to the watch list and update the escalation trend.

   Note: Updates to the escalation form send email notifications to the current user and to users on the watch list.

4. When the issue has been resolved, your users with the de-escalation requester role can de-escalate a case or an account.

Case and account escalation components

The roles, modules, and tables installed with the case and account escalation feature.

Roles

Roles included with the case and account escalation feature.

Different roles with the case and account escalation feature

Role	Description
Escalation requester (sn_customerservice.escalation_requester)	Can request an escalation for a case or account.

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Different roles with the case and account escalation feature (continued)

Role	Description
De-escalation requester (sn_customerservice.deescalation_requester)	Can de-escalate a case or account. This role contains the sn_customerservice.escalation_requester role.
Account Data Manager (sn_crm_account_data_manager)	Can request, view, update and delete an escalation for an account.
Escalation Configuration Viewer (sn_crm_escalation_config_viewer)	Can view all the escalation records, and Escalation Templates, and Escalation Severity modules.
Escalation Administrator (sn_crm_escalation_admin)	• Can create, update, view, and delete an escalation for an account escalation, escalation template, escalation severity. • Can request an escalation for a case or account. • Can de-escalate an account. This role contains Escalation requester (sn_customerservice.escalation_requester), De-escalation requester (sn_customerservice.deescalation_requester), and Escalation Configuration Viewer (sn_crm_escalation_config_viewer) roles.

Escalation modules

The case and account escalation feature adds the Escalations module to the Customer Service menu:

- **All**: lists all escalation records for cases and accounts.
- **Escalation Templates**: lists the case and account escalation templates.
- **Escalation Severity**: lists the types of escalation severity.

This feature also adds a list of escalated cases to the Customer Service menu: **Customer Service** > **Cases** > **Escalated**

Tables

Tables included with the case and account escalation feature:

Different tables with the case and account escalation feature

Table	Description
Escalation Templates [sn_customerservice_escalation_template]	Stores escalation template records.
Escalations	Stores records created for escalated cases and accounts.

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Different tables with the case and account escalation feature (continued)

Table	Description
[sn_customerservice_escalation]	
Escalation Severities [sn_customerservice_escalation_severity]	Stores escalation severity definition records.

Case and account escalation form

Customer service agents use the Escalation form to manage escalations for cases and accounts.

The Escalation form includes information about the escalation, such as the associated case or account, and the reason and justification for the escalation. It also includes information about the escalation as it progresses, including the trend and notes about the work being done to resolve the issue.

An escalation record can contain one or more associated cases. When updating escalation records, customer service agents can enter comments or work notes. For case escalations, updates are replicated to the case activity history as work notes so they aren't visible to the customer.

The Escalation form has a **Related Cases** related list that includes the related cases for account escalations. The user can associate specific cases using this related list to indicate which cases are causing the escalation. The Escalation form also includes **Task SLAs** and **Approvers** related lists.

Escalation form fields

Field	Description
Number	The number automatically assigned to the escalation request.
Source Record	The case or account for which escalation is requested. **Note:** The case or account form for the source record includes an **Escalations** related list.
State	The current state of the escalation: • **Requested**: An agent with the escalation requester role has requested an escalation for the case or account. • **Escalated**: The escalation request has been approved. • **Declined**: The escalation request hasn't been approved. • **Closed**: The reason for the escalation has been resolved and the escalation has been closed.
Request Source	The source of the case escalation request: • Customer requested • Internally requested
Reason	The reason for requesting the case escalation:

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Escalation form fields (continued)

Field	Description
	• Inactivity • Lack of Progress • Customer Imposed Deadline
Watch List	The watch list for this particular escalation record. For account escalations, you can **Add account team members to watch list**. Users added to the watch list for a case, account, or escalation record receive email notification when the case or account has been escalated and when updates are made to the escalation record.
Assignment group	For account escalations, the assignment group for this account.
Assigned to	For account escalations, the customer service agent assigned to this account.
Request By	The user who requested the escalation.
Approved By	If approved, the user who approved the escalation request.
Declined By	If declined, the user who declined the escalation request.
De-escalated By	The user who de-escalated the case or account escalation.
Escalation Type	The escalation type selected by the user who requested the escalation.
Escalation Severity	The escalation severity associated with this escalation, which defines the severity level for the escalation and the color used to highlight the escalated record in the user interface. • **High Severity**: Escalated records are highlighted in red. • **Medium Severity**: Escalated records are highlighted in orange.
Escalation Trend	The current state of the escalation: • **Improving** • **Same** • **Declining**
Escalation Justification	Additional information that explains why this escalation is needed.

Configure case digests

The Case Digests application enables you to provide periodic updates and resolution information about high priority customer service cases to customers and internal stakeholders. You can install the Case Digests application (com.sn_csm_case_digest) if you have the admin role.

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Before you begin

Role required: csm_guided_setup_user or admin

About this task

The Case Digests application includes two types of case communication:

- **Case action summary**: While a case is in progress, agents can send periodic case updates that describe actions taken, next steps, and other case-related information.
- **Post case review**: When the work on a case has been completed, agents can a post a case review document that captures details about the issue, such as the root cause, mitigation plan, and preventive actions.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Case Management category, view the list of tasks to configure the feature.

Case Digests

Task	Description
Activate Case Digests	Activate the Case Digests (com.sn_csm_case_digest) plugin.
Create Assignment Rules	Assignment rules automatically assign tasks to users and groups when the rule conditions are met. Two rules are provided with the case digests feature that assigns the post case review and case action summary records to the case agent: ○ Auto- assign the CAS to case agent ○ Auto- assign the PCR to case agent For more information, see Case action summary and post case review assignment rules.
Create Approval Workflows	The case digests feature includes one approval workflow that triggers the approval process for post case reviews. This workflow provides a one-step process that obtains a list of approvers from the **Approval group** and **Approval users** fields on the Post Case Review form.
Create Document Templates	Document templates identify, organize, and format the content from the case digest record that is included in generated documents. Two document templates are provided with the case digests feature, one for post case reviews and one for case action summaries.
Create a Case Digest Configuration	Case digest configurations handle different types of case review processes based on business needs.

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Task	Description
Create Mapping for Case Types	Create the mapping that identifies the case type fields that are copied to post case reviews and case action summaries.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Customer Service case digests

Customer Service case digests

Use the case digests feature to provide periodic updates and resolution information about high priority customer service cases to customers and internal stakeholders.

With this feature, you can send periodic case updates while a case is in progress using a case action summary. Once a case has been resolved, you can provide a post case review document that captures details about the issue, root cause, resolution, and preventive measures.

The case digests feature uses a configuration for case action summaries and post case reviews. The configuration determines the information from a customer service case that is captured as part of the case action summary or the post case review document. The configuration also identifies the template that is used to create the summaries and review documents.

Case digests workflows

Starting with the Zurich release, legacy approval workflows for the Case Digests (com.sn_csm_case_digest) application have been migrated to low code flows in Workflow Studio. The functionality of the flows remains the same.

Post case reviews can include optional approval workflows that trigger an approval process. These workflows are selected as part of the case digest configuration.

- New customers can select a flow from the **Approval flow** field on the Case Digest Configuration form when creating a configuration for a post case review.
- For upgrade customers:
  - Selecting an existing post case review configuration displays the legacy workflow in the **Approval workflow** field.
  - When creating a new configuration for a post case review, customers can select a low code flow from the **Approval flow** field.

Upgrade users with one or more case digest configurations that use legacy workflows can continue to use the configurations. No changes have been made to existing configurations.

The **Approval flow** field appears on the configuration record and on the Case Digest Configuration list by default. However, the **Approval workflow** field remains as part of the table and is functional.

Case action summaries

Use a case action summary to provide updates to customers and internal stakeholders while a case is in progress.

Customer service agents typically use case action summaries to communicate information about high priority cases and mass outage cases. Case action summaries can include both

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internal content and customer-visible information. The summaries available to customers include only the customer-visible information. The summaries available to internal users include both customer-visible information and internal content.

Customer service agents can:

- Create case action summaries for cases that are in progress.
- Preview summaries prior to publishing.
- Publish summaries to customers and internal stakeholders or publish to customers and send email notifications to internal stakeholders.
- Update and re-send summaries as needed.

Customer service agents use the **Send Case Action Summary** UI action to create a case action summary. This action creates a case action summary record and adds the record to the Related Records section on the Case form in the **Case Action Summary** field.

Customer service agents can preview a case action summary before publishing it to a case. In the preview, internal content appears after the customer-visible information and is identified with a message: **The following content is not visible to customers.**

When publishing a case action summary, agents have two options.

- When an agent clicks **Publish to Case**, the system takes the following actions:
  - Adds the information from the customer-visible fields to the **Additional comments** field.
  - Adds the information from all fields to the **Work notes** field.
- When an agent clicks **Publish to Case & Notify**, the system also sends an email notification with the case action summary to the internal users included in the recipient list selected in the **Additional internal recipients** field.

> **Note:** The **Publish to Case & Notify** UI action is available when a list has been selected in the **Additional internal recipients** field.

Closing a case automatically closes the corresponding case action summary.

Related topics

Create a case action summary

Post case reviews

Use a post case review to capture details about a resolved case, including a summary of the issue, affected assets, root cause, resolution, and any preventive measures.

Creating a post case review

Customer service agents can create post case reviews for cases that are in the **Resolved** state.

Agents can select the **Create Post Case Review** UI action to create a post case review document. This action creates a case action summary record and adds the record to the Related Records section on the Case form in the **Post Case Review** field.

Publishing a post case review

Agents can preview a post case review document before publishing and, if necessary, have the document reviewed and approved.

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Agents can add an approval group or approval users to the Post Case Review record and then request approval. The system sends an email notification to the approvers with a link to the post case review document. The approvers can either approve the document or suggest changes by adding them to the **Work notes** field on the Post Case Review record.

When an agent publishes a post case review document, the system adds a link to a PDF of the document in the **Additional comments** field on the Case form. The system also adds the record to the Related Records section on the Case form in the **Post Case Review** field. If the document is available to customers, the link is visible from the Customer and Consumer Service Portals.

Post case review configuration records

The configuration selected for post case review documents identifies the information from the case that is captured and populated in post case review record. The configuration also specifies the template that the system uses to create the post case review document.

Closing a case while a post case review is in progress

If a case is closed while the post case review document is in progress, agents can still update the **Additional comments** on the Case form with the post case review document link. Once a case is closed, the Post Case Review form displays a message that the associated case has been closed.

Post case review actions by role

Customer service roles can perform the following actions for post case review documents.

Post case review actions by customer service role

Role	Action
Customer service agent	• Create and preview one post case review document for a resolved case. • Request approval using an optional approval workflow. • Publish a post case review document to a case. • Reopen and edit a published post case review document.
Customer service manager	Review, approve, and suggest changes to post case review documents.
Major issue manager	• Create and publish post case review documents for resolved major cases. • Copy the documents to the associated child cases.
Customer	View post case review documents from the Customer and Consumer Service Portals.

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Post case reviews for major cases

Customer service managers and major issue managers can create and publish post case review documents for resolved major cases. These documents capture the case data specified in the configuration but do not include account-specific information. The customer service manager can also copy a post case review document to the associated child cases. The system adds the account-specific information when it generates the document for each child case.

The system administrator can enable post case review documents for major cases by setting the **sn_customerservice.parent_child_case_sync** system property to true.

Note: Setting this property to true disables the **Create Post Case Review** UI action for child cases.

Related topics

Create a post case review

Create a post case review for a major case

Post case review record states

Post case review records can be in a number of different states as they are created, approved, and published.

Different states of post case review records

State	Description
New	A case review record has been created but is not yet assigned to an agent.
In Progress	A case review record has been created and is assigned to an agent.
Awaiting Approval	An agent created a case review document from the case review record and sent it to one or more approvers.
Approved	The case review document has been approved by one or more approvers.
Closed	The case review record has been closed.

Post case review approvals

Enable an optional approval process for post case review documents.

In the case digest configuration, the system administrator can:

- Enable the approval process by selecting an approval workflow.
- Use a condition builder to define the conditions that determine the post case review documents that require approval.

One approval workflow, **Post Case Review - Default Approval**, is provided with the Case Digests plugin. This workflow reads the approvers from the **Approval group** and **Approval Users** fields on the Post Case Review form and sends an approval request notification to each user.

Approvers receive an email notification with a link to the post case review document. Approvers can either approve the document or suggest changes by adding them to the **Work notes** field on the Post Case Review form. The agent receives a notification when an approver approves the case review document or suggests changes.

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- If the approver suggests changes, the agent can see the changes in the **Work notes** field.
- If the approver approves the document, the status of the post case review record changes to **Approved**.

Case action summary and post case review assignment rules

Use assignment rules to assign case action summaries and post case review documents to customer service agents.

The Case Digests plugin includes two assignment rules:

- **Auto assign the CAS to case agent**
- **Auto assign the PCR to case agent**

When an agent clicks either **Send Case Action Summary** or **Create Post Case Review** on a case record, the system creates the corresponding record and automatically assigns it to that agent.

The system administrator can modify these assignment rules or define different rules to assign case action summary and post case review records. The system populates the **Assigned to** field on the Case Action Summary or Post Case Review form with the user determined by the assignment rule. If there are no active assignment rules, the **Assigned to** field remains blank and the record can be assigned manually.

If using the provided assignment rules that auto assign the records to the same agent:

- The agent clicks **Send Case Action Summary** or **Create Post Case Review** on the Case form.
- The corresponding record opens with the agent's name in the **Assigned to** field.
- The record state is **In Progress**.

If using assignment rules that do not auto-assign the records to the same agent:

- The agent clicks **Send Case Action Summary** or **Create Post Case Review** on the Case form.
- The corresponding records are created but are not displayed.
- If assigned to another agent, the **Assigned to** field displays the agent's name and the state updates to **In Progress**.
- If unassigned, the record remains in the **New** state.

Create a case action summary

Create a case action summary for a customer service case.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

You can send case action summaries for customer service cases that are in any states other than **New** or **Closed**.

After creating a case action summary, the record is added to the Case form in the Related Records form section. Closing a case automatically closes the corresponding case action summary.

Procedure

1. Open a customer service case.
2. To create a case action summary, do one of the following.

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- Agent Workspace: Click the More UI Actions icon (···) and select **Send Case Action Summary**.
- Platform interface: Click the form context menu icon and select **Send Case Action Summary**.

This opens a new Case Action Summary form with a status of **In progress**. Depending on the table map configuration defined for the case action summary, some of the information from the case is copied to the Case Action Summary form. With the CAS Configuration, this includes the information from the **Short description** field.

Note: The **Short description** field on the Case Action Summary form can be edited in the platform interface but cannot be edited in Agent Workspace.

3. In the Case Action Summary form, enter any necessary information in the following fields.

Case action summary form

Field	Description
Additional internal recipients	Select a recipient list. When an agent clicks **Publish to Case & Notify**, the system sends an email notification to the internal users in the selected list.
Short description	The short description from the case.
Case summary	A brief summary of the case.
Actions taken	Details about actions taken so far to resolve the case.
Next steps	The steps that the agent is planning to take in order to resolve the case. This field is not customer visible.
Internal notes	Other internal information that the agent wants to share regarding the case. This field is not customer visible.

4. Click **Preview** to generate the case action summary and view it in the Preview Document pop-up window.
5. **Optional:** Make any desired changes to the fields on the Case Action Summary form and click **Preview** again.
6. Click **Update** to save the changes to the case action summary.
7. Publish the case action summary using one of the following actions.

Action	Description
Publish to Case	Updates the case with the case action summary. ○ Information from the customer-visible fields on the case action summary is added to the **Additional comments** field on the Case form. ○ Information from the case action summary is added to the **Work notes** field on the Case form.

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Action	Description
Publish to Case & Notify	Updates the case with the case action sum mary as described above and sends an email with the case action summary to the internal stakeholders in the recipient list selected in the **Additional internal recipients** field. **Note:** The **Publish to Case & Notify** UI action is available when a list has been selected in the **Additional internal recip ients** field.

Create a post case review

Create a post case review document for a resolved case that captures the configured case information.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

You can create post case review documents for customer service product cases that are in the **Resolved** state. Creating a review document is a multi-step process that involves:

- Creating a post case review record from a case.
- Previewing the generated review document and making any corrections.
- Requesting approval, if necessary.
- Publishing the review document so that it is available to customers, internal stake holders, or both.

You can create one post case review document per case. If this document has already been created, the **Create Post Case Review** menu option is not available. You can view and edit the post case review document from the Related Records form section.

If a case is closed while the post case review is in progress, you can still update the **Additional comments** field on the Case form with the Post Case Review document link. When the case is closed, the system displays a message about the case closure on the Post Case Review form.

Procedure

1. Open a customer service case in the **Resolved** state.
2. To create a post case review record, do one of the following:
   - Agent Workspace: Click the More UI Actions icon (···) and select **Create Post Case Review**.
   - Platform interface: Click the form context menu icon and select **Create Post Case Review**.
3. In the Post Case Review form, enter any necessary information in the following fields.

   Some information is copied from the Case form to the Post Case Review form, such as the short description and the resolution information.

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Post Case Review form

Field	Description
Number	The automatically assigned post case review record number.
Case number	The case number from which this post case review record was created.
Assigned to	The agent assigned to the post case review record.
Commitment Date	The expected completion date of the post case review.
Assignment group	The group assigned to the post case review record.
Approval group	The group assigned to review and approve the post case review record. This field is visible if an approval workflow is selected in the case digest configuration.
Approval users	The users assigned to review and approve the post case review record. This field is visible if an approval workflow is selected in the case digest configuration.
Short description	Copied from the **Short description** field on the Case form.
Summary	A summary of the issue.
Symptoms	Specific symptoms or problems created by the issue.
Root Cause Analysis	Copied from the **Cause** field in the Resolution Information section on the Case form.
Solution Provided	Copied from the **Resolution notes** field in the Resolution Information section on the Case form.
Preventive Measures Taken	Any measures taken to prevent the issue from happening.
Work notes list	Internal users who receive a notification about this case when work notes are added.
Work notes	Information about how to resolve a customer service case, or steps taken to resolve it, if applicable.
Activities	Records all activity associated with this record.

4. Click **Preview** to generate the review document and view it in the Preview Document pop-up window.

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5. **Optional:** Make any desired changes to the fields on the Post Case Review record and click **Preview** again.
   You can edit the content in the Post Case Review record if the state is **New** or **In Progress**. Clicking **Preview** creates a preview of the document with the latest record information.
6. **Optional:** If approval is required, complete the following steps:
   a. Add an **Approval group**.
   b. Add one or more **Approval users**.
   c. Click **Request Approval**.

   (Optional) You can request approval for a post case review document before sharing it with customers or internal stake holders. When approval is requested, the status of the post case review moves to **Awaiting Approval** and the record is locked for edits.

   An email is sent to the approvers with a link to the post case review document. The approvers can either approve the document or suggest changes by adding them to the **Work notes** field on the Post Case Review record. The agent receives a notification when an approver approves the case review document or suggests changes.
   - If the approver suggests changes, the agent can see the changes in the **Work notes** field.
   - If the approver approves the document, the status of the post case review record changes to **Approved**.
7. Click **Save**.
8. Click **Publish to Case** to update the case with the Post Case Review document.
   The document is included as a link in the **Additional comments** field on the Case form. If the document is available to customers, the link is visible from the Customer and Consumer Service Portals.

Create a post case review for a major case

Create a post case review document for a resolved major case that captures the configured case information.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager, or admin

About this task

You can create a post case review document for a resolved major case if the **sn_customerservice.parent_child_case_sync** is set to true.

Note: Setting this property to true disables the **Create Post Case Review** UI action for child cases.

Procedure

1. Open a major case in the **Resolved** state.
2. Complete steps 2 through 7 in the Create a post case review topic.
3. Select one of the following options.

Option	Description
Publish to Case	The system performs the following actions:

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Option	Description
	a. Syncs the child case PCR record with the parent case PCR record. (If the child case PCR record is not present, the system cre ates a new child case PCR record.) The fol lowing fields are synced: ▪ Assigned To ▪ Case Digest Configuration ▪ Short Description ▪ Root Cause Analysis ▪ Solution Provided ▪ Summary ▪ Symptoms ▪ Preventive Measures Taken ▪ Commitment Date ▪ Assignment Group ▪ State ▪ Approval Users **b.** Generates a PDF document for all of the child case PCR records with customer-spe cific information. **c.** Adds a link to the PCR document to the **Ad ditional Comments** field on the child case form.
Copy to Child Cases	The system syncs the child case PCR record with the parent case PCR record. (If the child case PCR record is not present, the system creates a new child case PCR record.) The fol lowing fields are synced: ○ Assigned To ○ Case Digest Configuration ○ Short Description ○ Root Cause Analysis ○ Solution Provided ○ Summary ○ Symptoms ○ Preventive Measures Taken ○ Commitment Date ○ Assignment Group ○ State ○ Approval Users

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Review and approve a post case review

Review and approve a post case review document for a resolved case.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

When a customer service agent creates a post case review document that requires an approval, the system sends an email notification to the list of approvers. This email contains the following information:

- A short description of the case and the agent assigned to the case.
- Links to the post case review and case records.
- A link to download the post case review document.
- Links to approve the document or suggest changes.

When a post case review record is in the **Awaiting Approval** state, approvers can access the **Approve** and **Suggest Changes** UI actions.

Procedure

1. Click the link in the email to download the post case review document.
2. Review the document.
3. To suggest changes to the document:

   a. Click the link in the email to suggest changes.
   Alternately, click the link to open the post case review record and then click **Suggest Changes**.

   b. Add the information in the **Work notes** field on the Post Case Review record.

4. To approve the document:
   - Click the link in the email to approve the document.
   - Click the link to open the post case review record and then click **Approve**.

   The state of the post case review record changes to **Approved**.

Re-open a post case review

Re-open an approved post case review document if you need to make changes or update information.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

Procedure

1. Open a customer service case.
2. In the Related Records form section, access the record in the **Post Case Review** field.
3. Click **Re-open** on the Post Case Review form.
   The status of the record reverts to **In Progress**.
4. Make the necessary changes to the fields on the Post Case Review form.

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5. Click **Preview** to generate the review document and view it in the Preview Document pop-up window.
6. **Optional:** Click **Request Approval**.
7. Click **Publish to Case**.

Withdraw post case review approval

Withdraw a post case review document after sending it for approval.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Case Digest** > **My Post Case Reviews**.
2. Click and open a post case review which is in **Awaiting Approval** state.
3. Click **Withdraw**.
   The post case review document is now in **In Progress** state and approvers are notified by email that the request for approval is no longer required. You can edit the post case review document and resend it for approval.

Cancel a post case review

Cancel a post case review that hasn't been approved, rejected, or no longer requested state.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Case Digest** > **My Post Case Reviews**.
2. Select and open a post case review that you want to cancel.
3. Select **Cancel**.

   Note: If the post case review state was awaiting approval, approvers are notified by email that the post case review has been cancelled and approval is no longer required.

   The post case review document is now in **Cancelled** state.

Related topics

Re-open a post case review

Components installed with case digests

Several types of components are installed with the Case Digests plugin.

Tables

The Case Digests plugin adds the following tables:

- Case Digest Configuration (sn_csm_case_digest_config)
- Case Digest (sn_csm_case_digest_task)
- Post Case Review (sn_csm_case_digest_pcr)
- Case Action Summary (sn_csm_case_digest_cas)

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The Customer Service Document Template plugin adds the CS Document Template (sn_csm_doctemplate_template) table.

Extension points

The Case Digests plugin includes the following extension points. Customers can use these extension points to customize the publish action.

Case digests extension points

Extension point	Description
sn_csm_case_digest.CASPublish	Use this extension point to alter the functionality of publishing a case action summary to a case.
sn_csm_case_digest.PCRPublish	Use this extension point to alter the functionality of publishing a post case review document to a case.
sn_csm_case_digest.MajorPCRPublish	Use this extension point to alter the functionality of publishing a post case review document to a major case.

Activate Case Digests

Activate the Case Digests plugin to use the case digests feature.

Before you begin

Role required: admin

About this task

The Case Digests plugin automatically activates the following plugins:

- Case Management Core (com.sn_customerservice)
- Customer Service Document Template (com.sn_csm_doc_template)
- ServiceNow Document Viewer (com.snc.documentviewer)
- Targeted Communications (com.sn_publications)

The Case Digests feature uses the recipient lists feature from the Targeted Communications plugin (sn_publications).

When creating a case action summary record, users with the sn_esm_agent role can select a recipient list of the type Internal Users. Selecting the **Publish to Case & Notify** UI action on the Case Action Summary form sends an email notification to the users included in the selected recipient list.

Note: The **Publish to Case & Notify** UI action is available when a list has been selected in the **Additional internal recipients** field.

For more information, see Recipient lists.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_csm_case_digest.
3. Click **Activate**.

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Create a case digest document template

Create a template to use for generating case action summaries or post case review documents.

Before you begin

Role required: admin

Before creating a document template for case digests (used in Case Action Summaries and Post Case Reviews), ensure that the required plugins are active in your instance.

- Case Digests (`com.sn_csm_case_digest`)
- Outsourced for customer service (`com.sn_csm_outsource`)

Note: If the plugin is not active, contact your system administrator to activate it. The navigation menus and options described in this topic does not appear until the required plugins are active.

About this task

Document templates identify the information to be included in case action summaries and post case review documents. Create a document template to select, organize, and format the content included in the generated documents. You can create a template or modify an existing template. Two document templates, **CAS Template** and **PCR Template**, are included with the Case Digests plugin.

Procedure

1. Navigate to **All** > **Case Digest** > **Administration** > **Document Templates**.
2. Select **New** to create a template.
   You can also modify an existing template by selecting the template name and opening the template form.
3. Fill in the following fields on the CS Document Template form.

CS Document Template field description

Field	Description
Name	The template name.
Table Name	The table that contains the fields to include in the document template. ○ Case Action Summary [sn_csm_case_digest_cas] ○ Post Case Review [sn_csm_case_digest_pcr]
Category	Select or create a category to organize your templates.
Header Image	Select to add an image file to use in the document header.
Footer Text	Text to include in the document footer.
Header Position	The position of the image within the header: ○ Left align ○ Center align ○ Right align

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Field	Description
Body	The content to include in the generated case action summary or post case review document. Add content by selecting fields from the table identified in the **Table Name** field. Selected fields are added to the text editor.
Internal content	The content in the case action summary that is for internal users only. This field is available if the Case Action Summary table is selected in the **Table name** field.

4. Select **Submit** or **Update**.

After creating the case digest template:

5. Navigate to > **All** > **Case Digest** > **Administration** > **Configuration**.
6. Open an existing configuration or create new and select the template you created.
7. Select the template that you created in the **Document Template** field.
8. Select **Save** to save the record.

Related topics

Create a case digest configuration

Create a case digest configuration

Create case digest configurations to handle different types of case review processes.

Before you begin

Role required: admin

About this task

As part of creating a case digest configuration, you can define the specific information from a customer service case that needs to be captured as part of the review. Two configurations are included with the Case Digests plugin:

- CAS Configuration
- PCR Configuration

Procedure

1. Navigate to **All** > **Case Digest** > **Administration** > **Configuration**.
2. Click **New** to create a new configuration.
   You can also modify an existing configuration by clicking the configuration name and opening the configuration form.
3. Fill in the following fields on the Case Digest Configuration form.

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Case Digest Configuration form fields

Field	Description
Name	The configuration name.
Table name	The table that contains the fields to include in the configuration. ○ Case Action Summary [sn_csm_case_digest_cas] ○ Post Case Review [sn_csm_case_digest_pcr]
Order	Determine the order for the configuration. When multiple configurations match for a case, the configuration with the lowest order number is used.
Document template	Select a template to use when creating a case action summary from the Case Action Summary form or a post case review document from the Post Case Review form. You can select from a list of templates that have been defined for the table selected in the **Table name** field.
Case table	A read-only field that displays the Case [sn_customerservice_case] table.
Approval workflow	If using an optional approval workflow, select the workflow from the Workflow list.
Approval flow	If using an optional approval flow, select the flow from the Flows list. This field is displayed when the Post Case Review [sn_csm_case_digest_pcr] table is selected in the **Table name** field.
Case condition	Use the condition builder to select the case conditions to which this configuration applies.

4. Click **Submit** or **Update**.

Create a case digest table map

Create a table map to configure the fields that are copied from the case record to the post case review or the case action summary records.

Before you begin

Role required: admin

About this task

Two table maps are included with the Case Digests plugin. The **PCR Map** uses the Case (sn_customerservice_case) table as the source table and the Post Case Review (sn_csm_case_digest_pcr) table as the target table. The **PCR Map** maps the following fields.

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Case fields and Post Case Review fields on the PCR Map

Case field	Post Case Review field
sys_id	Case number
Short description	Short description
Cause	Root Cause Analysis
Close notes	Solution provided

The **CAS Map** uses the Case (sn_customerservice_case) table as the source table and the Case Action Summary (sn_csm_case_digest_cas) table as the target table. The **CAS Map** maps the following fields.

CAS MAP case fields

Case field	Case Action Summary field
sys_id	Case number
Short description	Short description

Procedure

1. To access the CSM Table Map list, navigate to **csm_table_map_list.do**.
2. Click **New** to create a new table map.
   You can also modify an existing table map by clicking the map name to open the map form.
3. Fill in the following fields on the CSM Table Map form.

CSM Table Map form fields

Field	Description
Mapping name	The table map name.
Application	Read only. The application for this table map.
API Name	Read only. The API for this table map.
Advanced Field Mapping	Enables advanced field mapping.
Source Table	The source table for the map.
Target Table	The target table for the map.
Active	Enables the mapping from the source to the target tables.
Use Advanced Condition	Enables advanced condition mapping, which uses a script. If enabled, add a script in the **Advanced Condition** field.
Advanced Condition	The script to use if the **Use Advanced Condition** field is enabled.
Conditions	Use the condition builder to select the conditions that apply to the table map.

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Field	Description
Order	Order of priority for processing multiple matching map definitions simultaneously to resolve dependencies. ○ If there is only one matching table map, the system uses that map. ○ If there are multiple matching table maps with the same order, the system uses the map with the older created date. ○ If there are multiple matching table maps with different orders, the system uses the map with the highest order.

4. Click **Submit**.
5. From the CSM Table Map list, select the table map created in step 2.
6. In the Basic Field Mapping form section, click **New**.
7. Select a **Source Field** and a **Target Field**.
8. Enable the **Active** check box.
9. Enter a number in the **Order** field
10. Click **Submit**.
11. Repeat steps 7 through10 for each field to be mapped.
12. Click **Update** on the CSM Table Map form.

Create a table map for case types

Create table maps to configure the case type fields that are copied from a case record to the post case review or the case action summary records.

Before you begin

Role required: admin

About this task

Case Type tables extend from the Case table but do not inherit the table mappings.

Procedure

1. Access the CSM Table Map list by navigating to **csm_table_map_list.do**.
2. Create two new table map records in the Case Digest scope, one for the post case review mapping and one for the case action summary mapping.
3. In the first record:
   a. Select the desired Case Type table in the **Source Table** field.
   b. Select the Post Case Review (sn_csm_case_digest_pcr) table in the **Target Table** field.
   c. Click **Submit**.
4. In the second record:
   a. Select the desired Case Type table in the **Source Table** field.
   b. Select the Case Action Summary (sn_csm_case_digest_cas) table in the **Target Table** field.
   c. Click **Submit**.

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5. For the two new case type table map records, map the fields from the source table to the target table in the Basic Field Mapping form section.
   For details, see Create a case digest table map.
6. Click **Update**.

Customer service case types

A case type defines the processes and data for resolving a specific type of customer issue. Use case types to create and configure the customer service case types your organization needs.

You can use case types to support a wide variety of end user needs, including:

- Diverse industries and products
- Complex processes, events, and systems
- Collaboration with multiple users

A good example of an industry that benefits from multiple case types is the banking industry. Within a bank, customer service agents can use this feature to create case types for different customer needs such as loan processing, credit card processing, or managing complaints.

Case types overview

Configuring case types

System administrators configure the case types feature by creating a table for the new case type that extends the Case table and then setting up a number of different processes and components for the case type.

- The Case Types Guided Setup section below provides an overview of these setup steps.
- For details about the case type guided setup tasks, see Configure customer service case types.

Managing case types

After creating a case type, system administrators can view case types, manage settings, and update the configuration.

For more information, see Manage customer service case types.

Using case types

Agents can use the case types feature when creating cases for customers by selecting from a list of configured case types. For more information, see the Using case types to create cases section below.

Customer service case types plugin

Users with the system administrator role can activate the Customer Service Case Types plugin (com.snc.csm_case_types) and Service Request Criteria plugin .

Activating these plugin adds the **Customer Service** > **Case Types** module to the application navigator. The system administrator can use this module to create and manage case types.

Note: Starting with the Zurich release, the Customer Service Case Types application (sn_csm_case_types) has moved to the ServiceNow Store. Any new enhancements to this application are delivered through the Customer Service Case Types store app.

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Product Model and Catalog Items Relationship plugin deprecation

The Customer Service Case Types plugin replaces the Product Model and Catalog Items Relationship plugin, which was deprecated in the Xanadu release. Use the Service definitions feature, available with the Customer Service Case Types plugin, to create definitions for the services that are offered to support your products. Then configure the service definitions to associate them with the appropriate products and catalog items.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Customer service case types applications

The following applications for specific case types are available from the ServiceNow® Store.

Application	Description
Case Playbook for Onboarding (sn_csm_onboarding)	Provides an onboarding case type to capture the details when onboarding customers for a product or service and a playbook that provides step-by-step guidance through the lifecycle of the onboarding process.
Case Playbook for Complaints (sn_csm_complaint)	Provides a complaint case type to capture the details for a customer complaint and a playbook that provides step-by-step guidance through the lifecycle of the complaint.

For more information, see Install an application or plugin.

Note: These applications have dependencies on the following plugins:

- Customer Service Case Types (com.snc.csm_case_types)
- Customer Service Case Action Status (com.snc.csm_action_status)

Case Types Guided Setup

Activating the Customer Service Case Types plugin adds the Case Types section to the Customer Service Management Guided Setup. Navigate to **Customer Service** > **Administration** > **Guided Setup** > **Case Types** and use the tasks in this section to create and configure a case type.

You can configure a number of different processes and components for a customer service case type, including client scripts and business rules; views, roles, and ACLs; and notifications and record producers.

To create and configure a new case type:

- Create a table for the new case type that extends the Case table (sn_customerservice_case).
- Configure UI actions, UI policies, and client scripts for the new case type.
- Configure views and view rules, roles and ACLs, and business rules for the new case type.
- Set up processes for the case type, including record producers, state flows, and special handling notes.

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- Create a case type definition record for the new case type and add it to the Case Type table (sn_case_type).
- Configure the **Get Case Types** flow and modify the conditions that determine visibility for a case type.

For more information, see Configure customer service case types.

Using case types to create cases

Customers can extend the Case table to handle different types of cases. Each extended case type can support multiple types of requests. For example, if a customer creates a case type for Credit Card Services, this case type can support requests such as applying for a new card and reporting a lost or stolen card.

When creating cases, customer service agents select the case type that corresponds to the customer issue.

- In CRM Workspace and CSM Agent Workspace, agents select a case type from the case type selector.
- In the platform interface, agents select a case type from an interceptor.

the case type selector has several versions that agents can use when creating cases of a specific type.

In CRM Workspace, the case type selector has several versions that agents can use when creating cases of a specific type. These versions include multi-select, single-select, and Product Service Select. The multi-select version is the default functionality. In CSM Agent Workspace, agents can use the multi-select version of the case type selector.

- Create a customer service case of a specific type
- Create a case task of a specific type for a customer service case

Configuring customer service case types

Configure case types to handle different types of customer issues. A case type identifies the processes and the data needed to resolve a specific type of issue.

Before you begin

Role required: csm_guided_setup_user or admin

To be compatible with CRM Workspace, Case Types must be version 4.0 or later.

About this task

For each case type, you create a table that extends the Case table and configure a number of items, such as business rules and client scripts, that drive customer issues of this type from creation to resolution. When creating cases, agents can select the case type that corresponds to the customer issue.

There are a sequence of tasks that enable you to configure case types for Customer Service Management. To configure Proactive Customer Service Operations, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Case Types category, view the list of tasks to configure the feature.

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Case types configuration tasks

Task	Description
Create Case Types	The first step in creating a case type is to create a table for the case type that extends the Case table (sn_customerservice_case). **Note:** This table should be created in a scope other than global. You can create a table for the case type using one of these methods: ○ Guided Application Creator ○ Platform table creation feature (navigate to **System Definition** > **Table** and click **New**) The extended table for the case type inherits most of the functionality of the Case table.
Set Up View Rules	View rules determine the form views that are available to users. Create view rules that determine the conditions for when the system displays the Case Type table in a specified view.
Set Up States for State Flows	State flows enable you to customize transitions from one state to another in tables derived from the Task [task] table, including the Case [sn_customerservice_case] table and tables extended from Case. You can configure the system to perform work during transitions to specific states. Create choice records for each of the states to be used in state flows for the case type. When creating your desired states, set the **Table** field to the table for the case type and the **Element** field to State.
Set Up UI Policies	UI policies dynamically change the behavior of information on a form, such as setting a field to read-only or making a field mandatory. The case type inherits the following UI policies from the Case table: ○ Show or hide major case information section ○ Make Partner Contact Read only If Partner is empty You can configure additional UI policies for the Case Type form.
Set Up Client Scripts	Client scripts allow the system to run JavaScript on the client when client-based events occur, such as when a form loads or when a field changes value. The case type

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Task	Description
	inherits the following client scripts from the Case table: ○ Empty Partner Contact on Partner Change ○ Empty Case Form on Account Change ○ Hide Request Related List ○ Hide SM section and list if no plugin ○ Hide Related Records Section You can configure additional client scripts for the case type.
Set Up Business Rules	A business rule is a server-side script that runs when a record is displayed, inserted, updated, or deleted, or when a table is queried. Use business rules to accomplish tasks like automatically changing values in form fields when certain conditions are met, or to create events for email notifications and script actions. You can set up the desired business rules for the Case Type table.
Set Up Case Type declarative actions	Declarative actions include the buttons, links, and context menu items that appear on lists and forms. A case type inherits the declarative actions from the Case table. You have the following options when setting up declarative actions for a case type: ○ Create new declarative actions for the case type. If you create a new declarative action, select the Case Type table in the **Table** field on the declarative action form. ○ Use any of the inherited case declarative actions. ○ Use a combination of the two. You can also block any inherited case declarative actions that you do not want. To block an action, update the **CSUIActionsImpl** script include.
Make sure that the sn_csm_case_types.enable_service_selector property which enables the case type selector is set to true.	The sn_csm_case_types.enable_service_selector property which enables the case type selector is set to true for zBoot customers, and can be enabled for upgrade customers.
Set Up Case Types	Register a newly created case type by creating a case type definition record. This record is stored in the Case Type table (sn_case_type) and includes the following information:

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Task	Description
	○ The name of the case type ○ The table created for the case type ○ An optional category ○ An optional subtype ○ A short description ○ A field for setting the case type to active The Case Type table extends the Application File table (sys_metadata). This table includes a **Domain** column that customers can use to add their own logic. To create a case type definition record, navigate to **Customer Service** > **Manage Case Types** and click **New**. After creating and saving the case type definition record, you can configure the following process information for the case type using the related lists on the Case Type form: ○ State flows ○ Special handling notes ○ SLAs ○ Email templates ○ Quick messages ○ Reports For more information, see Manage customer service case types. **Note:** These related lists only display information for the new case type. They do not include information for the base case.
Set Up Notifications	Notifications keep users informed about different activities and events. You can determine the conditions when a notification appears by creating a record in the Notification table.
Set Up Roles	Create one or more roles to control access to the case type features and capabilities. Then grant these roles access to the desired applications and modules. For agents to work on a case type, configure the case type role to contain the sn_customerservice_agent role.
Set Up ACLs	Use Access Control List rules (ACLs) to restrict access to data. These rules require

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Task	Description
	users to pass a set of requirements before they can interact with data. For external customers to see a case type, add ACLs that provide read or create access for external users.
Set Up Case Type Selection Conditions	When creating a case of a specific type, an agent clicks **Create Case** and then selects from a list of available case types. The system presents the case types that have been configured for the agent's role. To set up case type selection conditions, use Flow Designer to configure the **Get Case Types** flow and modify the conditions that determine visibility for a case type. There are two different implementations of the **Create Case** declarative action: ○ The Customer Service plugin provides a **Create Case** declarative action that agents can use as follows: ▪ To create a base case. ▪ To create a case for one specific case type. For example, if your organization always creates the same type of case and you have created only one extension of the Case table, you can modify this declarative action to create a case of that specific case type. ○ The Customer Service Case Types plugin also provides a **Create Case** declarative action that agents can use to create a case based on a selected case type. After clicking this declarative action to create a case, the agent selects the desired case type from a list of multiple available case types. **Note:** It is recommended that you configure one of the **Create Case** declarative actions but not both to avoid confusion.
Set Up Record Producers	A record producer is a specific type of catalog item that enables users to create task-based records, such as case records, from the service catalog. Create a record producer that exposes the new case type on the Customer Service Portal.
Set Up Case Digest for Case Types	The case digest feature enables agents to proactively communicate with customers

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Task	Description
	and internal stakeholders about cases. While a case is in progress, agents can send periodic case summaries that describe actions taken, next steps, and other case-related information. When the work on a case has been completed, agents can create a post case review that includes information such as the root cause, mitigation plan, and preventive actions. **Note:** Using case types with the case digest feature requires the Customer Service Case Types plugin (com.snc.csm_case_types) and the Case Digests plugin (com.sn_csm_case_digest). Cases that are created from a selected case type can use Case Action Summaries and Post Case Reviews. To create the mapping that identifies the case type fields that are copied to Post Case Review and Case Action Summary records: ○ Create a configuration for the desired case type. Navigate to **Case Digests** > **Configuration** and click **New**. ○ Create new records in the CSM Table Map table (csm_table_map) to map the **Send Case Action Summary** and **Create Post Case Review** declarative actions. The Case Digests related list on the Case Type form shows the case action summaries and post case review configurations for a case type.
Set Up Contextual Search for Case Types	Navigate to **Contextual Search** > **Table Configuration** and create a table configuration record to add contextual search to the case type. In this record, configure the **Table** field as the case type and the **Search Context** field as Case Knowledge Base Search.
Set Up CRM Workspace for Case Types	To configure CRM Workspace differently for each case type, follow the CRM Workspace Guided Setup. You can configure the following features specific to each case type: ○ Workspace lists ○ Notifications ○ Highlighted values ○ Ribbon settings

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Task	Description
	○ Form headers ○ Action assignments
Set Up Portal View for Case Types	Configure the fields that a customer can see when they view a case on the Customer or Consumer Service Portals. Create a new record to configure the fields for each case type. For more information about the Ticket Configuration form, see Configure the standard ticket page.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Enable the case type single select property

Create a configuration for case type single-select

Configure case type ribbon settings

Create a ribbon configuration for a case type or enable ribbon configurations to be inherited by the case type.

Before you begin

Role required: admin

About this task

In the Customer Service Management application, a case type represents the data and processes that are needed to resolve a specific type of customer issue. The administrator can create a table for a new case type that extends the Case table (sn_customerservice_case). The extended table for the case type inherits most of the functionality of the Case table.

As part of configuring forms, you can configure ribbon settings for case types. The ribbon appears at the top of the form and includes components that display customer and case information, such as Customer 360, Timeline, and Active SLA. Each component has a ribbon setting that stores configuration information about that component.

Case types that are extended from the Case table can display these components in the ribbon on the Case form. For case types, you can do the following:

- Create ribbon settings for case extensions, or
- Modify existing ribbon settings so that the case extensions inherit the ribbon component behavior.

To modify ribbon component behavior, use the following procedure.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Forms** > **Ribbon Settings**.
2. Select the component name in the Ribbon Settings list.

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For example, you can select Customer 360.

3. On the Ribbon Setting form for the selected component, enable the **Inherit** check box.
4. Select **Update**.
5. Repeat steps 2–4 for each component to be displayed in the ribbon.

Configure case type declarative actions

Configure declarative actions that enable agents to create cases and case tasks from different locations within CRM Workspace.

Before you begin

Role required: admin

About this task

The Customer Service Case Types plugin includes declarative actions that enable agents to create cases and case tasks using the case type selector and case task type selector. These declarative actions are disabled by default.

Declarative actions, locations, and actions

Action label	Location	Action
Create Case	Appears on the Case Task list views.	Displays the case task type selector.
Create Case	Appears on the Tasks related list tab on case and case type records.	Displays the case task type selector.
Create Case	Appears on the Case and Case Type list views.	Displays the case type selector.

Declarative actions are stored in the Action Assignment [sys_declarative_action_assignment] table.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **Form Actions**.
   The system displays the Action Assignments list.
2. Filter the list to display the actions for the CSM Case Types application.
   If necessary, configure the list to display the **Application** column.
3. For each of the desired declarative actions, set the **Active** field to true.

Configure the service selector modal size

The service selector modal displays a list of available services to an agent when they are creating a case. Users with the admin role can configure the size of the service selector modal.

Before you begin

Role required: admin

Procedure

1. Navigate to the **sys_declarative_action_payload_definition.list** in the application navigator to display the Action Payload Definitions list.
2. Filter the **Label** field to display Case Type Selector.
3. Select the desired record from the **Key** column.
4. Edit the record and change the size of the modal in the **Payload** field.

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The following choices are available: small, medium, large, xl. For example, enter: `"size": "xl",`

5. Select **Update**.

Enable the case type single select property

Enable the case type single select property so that customer service agents can use the case type single select version of the case type selector and create cases of a specific type with one click.

Before you begin

Role required: admin

About this task

In CRM Workspace, there are three versions of the case type selector available to agents when creating cases of a specific type.

- With the multi-select version, the agent selects a case type and optionally selects a category and subtype to narrow the available choices before creating a case. This is the default functionality.
- With the single-select version, the agent selects a case type and creates a case. The system populates some of the fields on the Case form with values that have been predefined in the selection configuration.
- With the Product Service Select version, the agent selects a product and a service to create a case. For more information, see Product Service select version of the case type selector.

To use the single-select version, enable the *sn_csm_case_types.case_type_single_field_select* property. You must also create a configuration.

Procedure

1. Navigate to **sys_properties.list**.
2. Click the *sn_csm_case_types.case_type_single_field_select* property in the **Name** field.
3. Set the **Value** to true.
4. Click **Update**.

Create a configuration for case type single-select

Create a configuration for the single-select version of the case type selector and define the fields and values that the system uses to auto-populate the Case form.

Before you begin

Role required: admin

About this task

In CRM Workspace, there are three versions of the case type selector available to agents when creating cases of a specific type.

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- With the multi-select version, the agent selects a case type and optionally selects a category and subtype to narrow the available choices before creating a case. This is the default functionality.
- With the single-select version, the agent selects a case type and creates a case. The system populates some of the fields on the Case form with values that have been predefined in the selection configuration.
- With the Product Service Select version, the agent selects a product and a service to create a case. For more information, see Product Service select version of the case type selector.

To use the single-select version, follow the procedure below to configure one or more selections that are available to agents when creating a case. You must also enable the case type single select property.

Procedure

1. Navigate to **All** > **Customer Service** > **Case Types** > **Manage Case Types**.
2. Select a case type.
3. In the Case Type Selections related list, click **New**.
4. In the **Name** field, enter a descriptive name for the case type selection.
   This is the name that agents see in the **Case Type** field on the Select Case Type pop-up window.
5. In the **Default case type field values** fields, select the desired fields and the corresponding values.
   The system uses this field and value configuration to auto-populate those fields on the Case form when an agent creates a case of this type.
6. Click **Submit**.
   The system saves the configuration in the Service Definition (sn_case_type_selection) table and adds it to the Case Type Selections related list.

Manage customer service case types

Manage the settings and the configuration for a case type from the Case Type form.

After using the Customer Service Management Guided Setup to create and configure a case type, you can view and manage the settings and configuration for the case type from the Case Type form. To access a Case Type form, navigate to **Customer Service** > **Case Types** > **Manage Case Types** and select a case type from the list.

Case Type form related links

The Case Type form includes the following related links.

Case Type form related links

Related link	Description
View Case Type Configuration	Displays the current configuration for this case type, including: • Business rules • Client scripts • Dictionary entries and overrides • Notifications

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Case Type form related links (continued)

Related link	Description
	• UI actions • Access controls • UI policies • Data policies • Styles • View rules • Flows
Launch Guided Setup for Case Types	Goes to the Case Types setup tasks in Customer Service Management Guided Setup.
Launch Guided Setup for AWA	Goes to the Advanced Work Assignment (AWA) setup tasks in CRM Workspace Guided Setup.
Launch Guided Setup for CRM Workspace	Goes to the CRM Workspace setup tasks in Customer Service Management Guided Setup.

Case Type form related lists

The Case Type form related lists display items configured for the case type table. Use the related lists to create additional configurations.

- Record Producers
- State Flows
- Special Handling Notes
- SLAs
- Email Templates
- Quick Messages
- Reports
- Case Type Selections

Select a category and subtype for a case type

The system administrator can assign an optional category and a subtype to a case type. When creating a case, agents can filter the available case types by category and subtype in the case type selector. If an agent selects a category, the list of case types displayed is filtered by that category. If an agent selects a subtype, the list is further filtered by that subtype.

The Customer Service Case Types plugin includes several categories that the system administrator can select for a case type. These categories include:

- Onboarding
- Complaint
- Orders
- General

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The **Subtype** field displays fields from the Case Type table that are of the following type:

- Choice list
- Reference

To select a category and a subtype for a case type:

1. Navigate to **Customer Service** > **Case Types** > **Manage Case Types** and select a case type.
2. Select a category in the **Category** field.
3. Select a field in the **Subtype** field.
4. Select **Update**.

Case types and major cases

The system administrator can enable the **Propose Major Case** UI action for different case types. If this UI action is available, an agent can propose a major case from the selected case type record. If the major case candidate is accepted, a major case is created and the case type record is added as a child case on the major case.

The major case is created on the base Case table. Updates to the major case are synchronized to the child case types. Multiple case type records can be added to the same major case.

Case type selector

The case type selector enables customer service agents to quickly and easily create the right kind of case for a contact or consumer by selecting from a list of available case types or services.

Overview

The case type selector is a component that provides agents with the ability to select the appropriate case type or service when creating a case. For example, an agent can use the case type selector to do the following:

- Select a case type and create a case of that type.
- Select a product from a list of products owned by the customer and create a case for that product.
- Select a service and create a case for that specific service.

The selections that an agent can make is determined by the case type selector configuration. The system administrator can configure different versions of the case type selector by setting properties. The different versions include:

- Multi-select (default)
- single-select
- Product Service select

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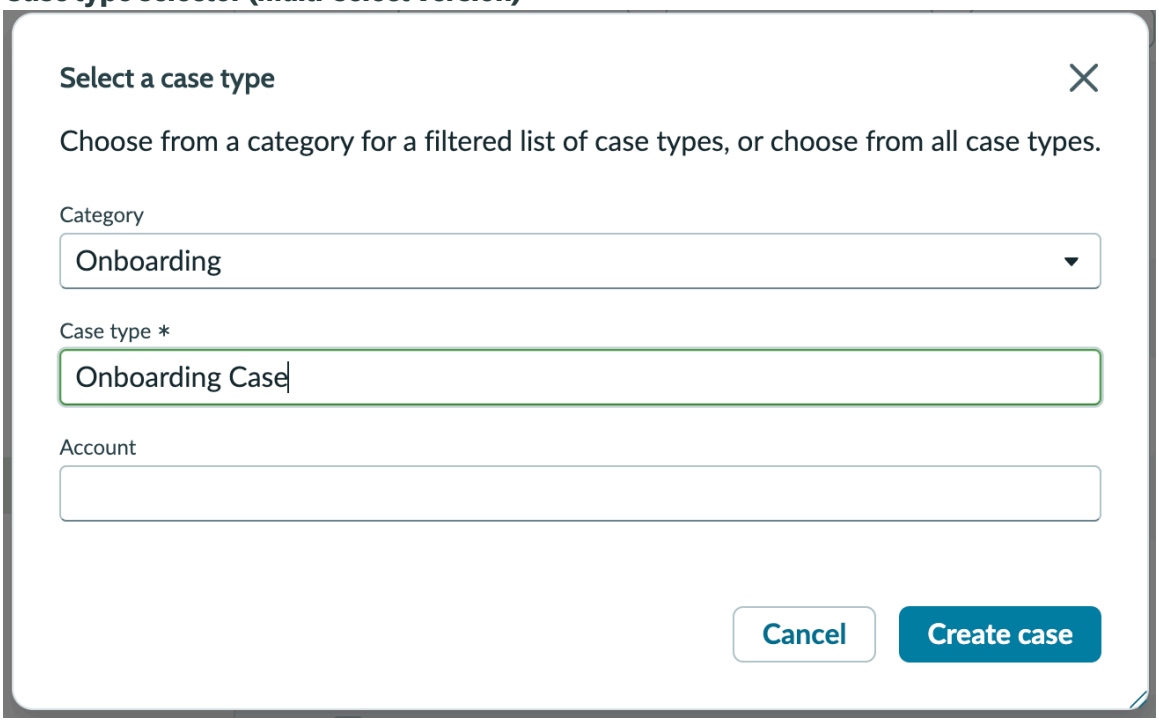
Case type selector (multi-select version)



Using the case type selector

The system displays the case type selector when an agent creates a case from a list or a record.

Agent actions that display the case type selector

Agent action	Description
Select **New**	Select this action from case lists and case type lists such as My Cases or My Complaint Cases.
Select **Create Case**	Select this action from the following records: • Interaction • Account • Contact • Consumer • Sold Product • Install Base Item • Case • Child Case

Some declarative actions available with the Customer Service Case Types plugin are disabled by default. For more information, see Configure case type declarative actions.

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Case type selector versions

Different versions of the case type selector are available for agents to use. The system administrator can configure system properties to determine the version of the case type selector that is presented to agents.

Versions of the case type selector component

Version	Description
Multi-select	With the multi-select version, the agent selects a case type and optionally selects a category to narrow the available choices before creating a case. A category subtype field can also be configured. This field can be a choice list field or a reference field from the Case Type table. **Note:** If a subtype has not been configured for a case type, the subtype field is not displayed. The multi-select version of the case type selector is the default functionality. For more information, see Select a category and subtype for a case type.
Single-select	With the single-select version, the agent selects a case type from a list of available case types and creates a case with one click. The system uses configured field mapping to fill in some of the fields on the Case form. The display of the single-select version is controlled by the *sn_csm_case_types.case_type_single_field_select* system property. • When enabled, the system displays the single-select version. • When disabled, the system displays the multi-select version. **Note:** The single-select version is only available in CRM Workspace. For more information, see the following topics: • Enable the case type single select property • Create a configuration for case type single-select
Product Service Select	With the Product Service Select version, the agent selects a product and/or a service to create a case. For more information, see Product Service select version of the case type selector. The display of the Product Service Select version is controlled by the

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Versions of the case type selector component (continued)

Version	Description
	sn_csm_case_types.service_definition_select system property. • When enabled, the system displays the Product Service Select version of the case type selector. • When disabled, the system uses the value of the *sn_csm_case_types.case_type_single_field_select* property.

Case type select properties

The following properties determine which version of the case type selector is presented to agents.

Version properties of a case type selector

Property	Description
sn_csm_case_types.case_type_single_field_select	Set this property to true to enable the case type single select feature in CRM Workspace. When enabled, an agent can use this feature to create a case of a specific type with a single selection in the case type selector. • **Type:** true | false • **Default value:** false • **Location:** System Property [sys_properties] table
sn_csm_case_types.service_definition_select	Set this property to true to enable the Product Service Select version of the case type selector in CRM Workspace. When enabled, an agent can use this version to create a record based on the selected product or service. • **Type:** true | false • **Default value:** true • **Location:** System Property [sys_properties] table This property overrides the *sn_csm_case_types.case_type_single_field_se* property. • When set to true, the system displays the Product Service Select version of the case type selector. • When set to false, the system uses the value of the

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Version properties of a case type selector (continued)

Property	Description
	sn_csm_case_types.case_type_single_field_s property. • If both properties are set to true, the *sn_csm_case_types.service_definition_selec* property takes precedence. • If both properties are set to false, the system displays the multi-select version of the case type selector.
sn_csm_case_types.service_definition_select_count	Determines the number of the products and services displayed in the Product Service Select version of the case type selector. • **Type:** integer • **Default value:** 25 • **Location:** System Property [sys_properties] table

Configuring service definitions for cases and case tasks

The system administrator creates the service definitions for cases and case tasks, along with their relationships. The service definition manager and service definition admin can also create these service definitions and relationships.

For case task service definitions, the system administrator can include logic and default field values that the system uses when creating the case tasks. For more information, see Configuring service definitions.

Product Service select version of the case type selector

With the Product Service select version of the case type selector, agents can create cases of the correct type based on the selected product or service.

The Product Service select version of the case type selector supports services as well as case types. This version of the case type selector makes it easier for agents to find the available services for a product. This version of the case type selector enables the agent to do the following:

- Select a product from a list of products owned by the account or consumer and see the available services for that product. This list includes sold products and install base items.
- Select a category of services and see the available services within that category.
- Search for a service by entering keywords in the search box.
- Browse the available services using scroll bars and pagination.
- Select a service and create a case based on the service or case type.

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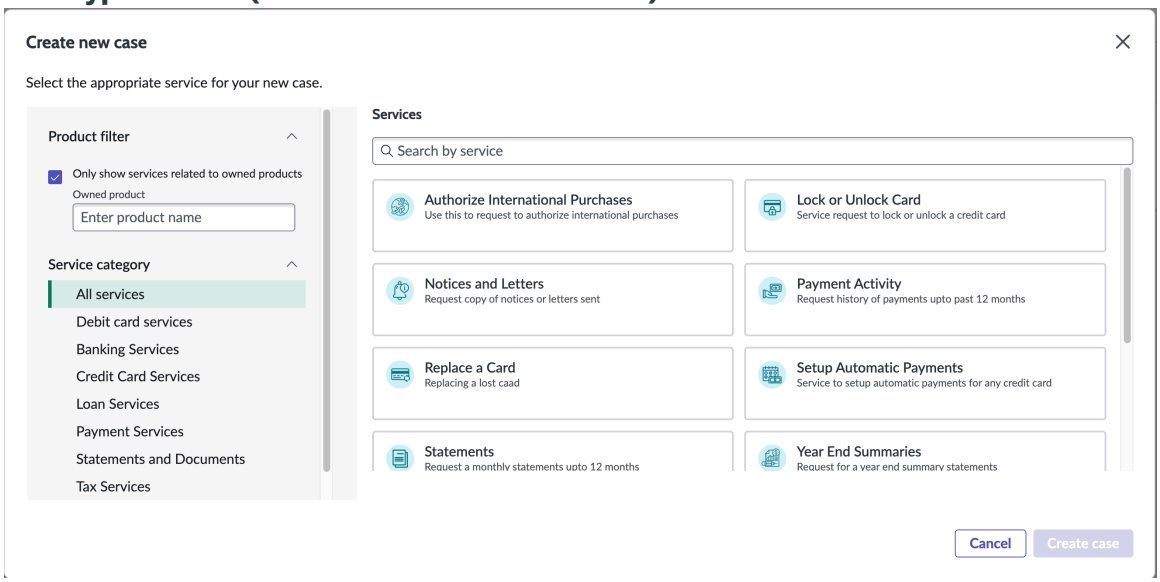
Case type selector (Product Service select version)



Creating cases using the Product Service select version

The system displays the case type selector when an agent creates a case from a list or a record. The fields that are available in the Product Service select version of the case type selector are context-driven based on how an agent creates a case.

Agent actions that display the case type selector

Agent action	Description
Select **New**	Select this action from case lists and case type lists such as My Cases or My Complaint Cases.
Select **Create Case**	Select this action from the following records: • Interaction • Account • Contact • Consumer • Sold Product • Install Base Item • Case • Child Case

Creating cases from a record

When creating a case from a record, the Product Service select version of the case type selector includes the following sections and fields:

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Product Service Select fields

Field	Description
Product filter	Use the fields in this section to select a product
Only show services related to owned products	This check box controls the display of the **Owned product** field and determines the services included in the Services section. • If checked, the system lists the services categorized as post-sales that are relevant to the product selected in the **Owned product** field. • If cleared, the system lists the services categorized as pre-sales and general.
Owned product	Use the **Owned product** field to select a product. This field uses typeahead search. Place the cursor in the field and start typing to display a list of products. Selecting a product filters the available services in the Services section. For sold products and install base items, the first line of an entry in the **Product** drop-down list displays the name of the product from the Product Model record. The second line displays the name of the sold product or install base item associated with the product model.
Service category	Select a category to see the available services within that category or select **All categories** to see all available services.
Services	Select a service in the Services section. • Services are displayed in a card format that show the service name, description, and image or icon. • Use a keyword search to narrow the list of available services. • Use the scroll bars and pagination to view the available services.

Agents can select **Create Case** from the following records, which provide context about their owned products and services.

Record types with the Create Case action

Record	Description
Interaction	Applicable services are based on products owned by the contact or consumer.
Account	Applicable services are based on products owned by the account.
Contact	Applicable services are based on products owned by the contact and products that the contact has access to based on related party access.

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Record types with the Create Case action (continued)

Record	Description
Consumer	Applicable services are based on products owned by the consumer.
Sold Product	The **Owned product** field is auto-filled with the product model from the Sold Product record.
Install Base Item	The **Owned product** field is auto-filled with the product model if the install base item is mapped to the product model. If there's no product model associated with the install base item, the **Owed product** field lists the products for the account and contact.
Case	
Child Case	

Creating cases from a list

Agents can select **New** from a case list or case type. Because there's no customer context, the services listed include all available services (pre-sale, post-sale, and general).

Service categories

The administrator can group services into categories so that it's easier for agents to find the services the need. Categories are displayed in the Service categories section. Agents can select a specific category to see the available services within that group or **All categories** to see all available services.

Service cards

The Product Service select version of the case type selector displays the available services in a card view. Each card can include the following information for a service, depending on the configuration:

- Name
- Description
- Image

When an administrator creates a service definition, they can provide a name for the service. They can also provide a description of the service and add an image to represent the service. For more information, see Create a service definition.

Browsing services in the case type selector

Agents can browse the available services for a selected category or for all categories. These services are displayed in a card view.

The Product Service select version of the case type selector can display multiple pages of services. It can display 24 services at a time and a total of 200 services.

The agent can perform the following actions:

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- Use the scroll bars to view all the displayed services.
- Select **Show more** to see the next set of services (up to a maximum of 200) if more than 24 services are available.
- Filter the displayed services by selecting a category.
- View a count of the available services after applying a filter.

Note: The system displays the services that the logged-in agent has access to.

When the agent reaches the limit of 200 services, the system directs the agent to refine the results.

Searching for a service

Agents can search for a service by entering keywords in the search box.

- A list of recent searches appears below the search box
- Search results include the services with names or descriptions that contain the keywords.
- Results are displayed in a card view.

Creating a case for a service

Agents can create cases from lists and from records.

Agents can create cases by selecting a service from the Product Service select version of the case type selector and then selecting **Create Case**.

Agents see the Product Service select version with the Product filter when they create a case from the following records.

- Interaction
- Account
- Contact
- Consumer
- Sold Product
- Install Base
- Case
- Child Case

The **Only show services related to owned products** check box is selected by default.

- When selected, the agent can see Post-sales services.
- When cleared, the agent can see Pre-sales, Post-sales, and General services.

If the agent is on a Sold Product or Install Base record, the **Owned product** field is auto-populated.

If a customer hasn't activated the install base:

- The Product Service Select version displays the **Service** and **Case type** fields.
- The **Service** field lists all services, including pre-sales and post-sales.
- Agents can select **Create Case** from an interaction, account, contact, or consumer record and select a case type in the **Case type** field.

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Case type selector configuration

The Product Service select version of the case type selector includes a product filter. If you have the administrator role, you can configure the case type selector to hide this filter.

By default, this configuration setting is false. The case type selector displays the product filter, the **Only show services related to owned products** check box is empty, and the case type selector shows all available service definitions.

To hide the filter:

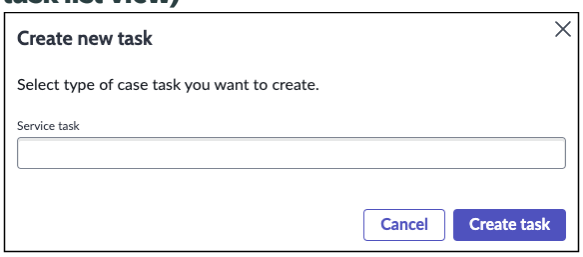
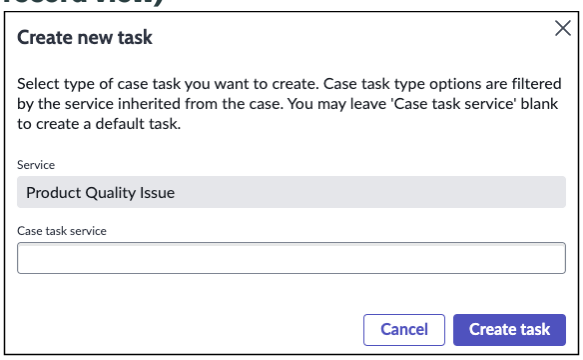
1. In the application navigator, **sys_declarative_action_payload_definition.list** and press **Enter**.
2. In the Key column, select **CREATE_CASE_TYPE**.
3. In the **Payload** field, locate the **hideProductFilter** setting.
4. Change the value of the setting from false to true and select **Update**.

When this configuration setting is true, the case type selector doesn't display the product filter. The case type selector shows all available service definitions.

Case task type selector

The case task type selector is a component that provides customer service agents with a way to create the right types of tasks while working on cases.

Using the case task type selector, agents can select services and create case tasks specifically for those services. The selections that an agent can make within the case task type selector depends on where they create a case task from.

Case Type Task Selector Options	
When an agent creates a case task from a case task list, they can select a service in the case task type selector.	**Case task type selector (case task list view)** 
When an agent creates a case task from a case record, the case task type selector shows related services based on the case type.	**Case task type selector (case record view)** 

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An agent working on a case or a case type can create case tasks in the following ways.

How to create case tasks

Select **New** from a case task list	The **Service task** field on the case task type selector shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
Select **New** from the Tasks related list tab on a case record	The **Service** field is auto-filled with the case service. The **Case task service** field lists the task services related to the case service. If the case has no service, the **Service task** field shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
Select the **+** icon on the related records task list in the Dynamic Related Records component	The **Case task service** field on the case task type selector shows the following services: • The task services related to the case service. • The related services where the service target table is Case Task and extensions of Case Task.
Select **Create Task** in a case playbook stage	The **Service** field is auto-filled with the case service. The **Case task service** field lists the task services related to the case service.
Select **Create Task** in the activity viewer	The **Service** field is auto-filled with the case service. The **Case task service** field lists the task services related to the case service.

Some declarative actions available with the Customer Service Case Types plugin are disabled by default. For more information, see Configure case type declarative actions.

Configuring service definitions for cases and case tasks

The system administrator creates the service definitions for cases and case tasks, along with their relationships. The service definition manager and service definition admin can also create these service definitions and relationships.

For case task service definitions, the system administrator can include logic and default field values that the system uses when creating the case tasks. For more information, see Configuring service definitions.

Onboarding case type

Agents can use the onboarding case type to capture the details when onboarding customers for a product or service.

The onboarding case type includes a playbook that provides step-by-step guidance through the lifecycle of the onboarding process.

Onboarding cases use the ONB prefix in the case number. For example, ONB0001007. Onboarding cases appear in the Onboarding Cases module in the following lists:

- My Onboarding Cases
- All Onboarding Cases

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- Unassigned Onboarding Cases
- Escalated Onboarding Cases

When creating a case, agents can select **Customer Onboarding** from the list of available case types.

Creating onboarding cases for new or existing customers

Customer service agents can create cases to onboard new customers or to onboard existing customers for new products.

The onboarding case form includes the **New customer** check box. Agents can enable this check box to display the New Customer Information section on the Case form. This form section includes fields that you can use to collect information and create a customer record.

Note: A new customer doesn't have an existing account, contact, or consumer record.

If an existing case already has the **Account** and **Contact** or **Consumer** fields populated, then the **New customer** check box is turned off.

When saving an onboarding case:

- If the **New customer** check box is enabled, the **Account** and **Contact** or **Consumer** fields aren't required to save the case.
- If the **New customer** check box is inactive, the **Account** and **Contact** or **Consumer** fields are required to save the case.

New Customer Information form section

The New Customer Information form section includes fields that agents can use to collect information. This information is then used to create a customer record. These fields include:

- Customer Type: either Business or Individual
- Business Name: Required when the customer type is Business
- User Name: Required when the customer type is Individual
- Phone number
- Email

Additional members

The onboarding case type includes the **Additional Members** related list on the Case form. Agents can use this related list to create the users or business entities that should be included in the onboarding case.

Additional members can be any of the following:

- Accounts
- Contacts
- Consumers

Agents select information from the following fields when adding a member to an onboarding case:

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- Type: the type of user to be added. For example, a joint owner or a beneficiary or a sub-account.
- Name: the name of the contact or consumer or account.

Note: If using the onboarding playbook, the user is also added to the Member Information card in the Add additional members step of the Initiate stage.

Onboarding case type stages and states

An onboarding case moves through several stages and states as the agent works to case resolution.

An onboarding case has six stages:

- Initiate
- Pre approval
- Data capture
- Due diligence
- Resolve
- Close

As an onboarding case moves through the stages listed earlier and toward a resolution, the case status is updated. Stage and status are related to each other as described in the following table.

Onboarding case stages and status

Stage	Status	Description
Initiate	New	An onboarding case is created in the **Initiate** stage with a status of **New**. An onboarding case can only be in the **New** state during the Initiate stage.
Initiate	Open	The state of an onboarding case state changes to **Open** when the case is assigned to an agent.
Pre approval	• Open • Awaiting Info	In the Pre-Approval stage, an onboarding case can be in either the **Open** or **Awaiting Info** states. The case moves to the **Awaiting Info** state when an agent selects **Request Info**.
Data capture	• Open • Awaiting Info	In the Data Capture stage, an onboarding case can be in either the **Open** or **Awaiting Info** states. The case moves to the **Awaiting Info** state when an agent clicks **Request Info**.
Due diligence	• Awaiting Info • Under Review	In the Due Diligence stage, an onboarding case can be in the **Awaiting Info** or **Under Review** states. The case moves to the **Awaiting Info** state when an agent selects **Request Info**. The case moves to the **Under Review** state when an agent selects **Submit for Review**.

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Onboarding case stages and status (continued)

Stage	Status	Description
Resolve	• Review Complete • Resolved	In the Resolve stage, an onboarding case can be in either the **Review Complete** or **Resolved** states. The case moves to the **Review Complete** state when an agent clicks **Review Complete**. The case moves to the **Resolved** state when an agent selects **Propose Solution**.
Close	Closed	The case is closed.

Components installed with case types

Several types of components are installed with the Customer Service Case Types plugin (com.snc.csm_case_types), including components that support the service definitions feature.

Tables installed with case types

The following tables are installed with the Customer Service Case Types (com.snc.csm_case_types) plugin.

Tables added with case types

Table	Description
Case Type [sn_case_type]	This table stores the defined case types. For more information, see Customer Service case types.
Service Definition [sn_case_type_selection]	This table stores the defined service definitions. The service definition feature adds the following fields to the Service Definition table: • Domain Path • Playbook Record Generator • Active • Number For more information, see Service definitions.
Service Definition Category [sn_csm_case_types_service_category]	This table stores the categories that are created for service definitions.
Service Definition Category Relationships [sn_csm_case_types_service_category_rel]	This table stores the service definitions that are associated with a service definition category.
Product Service Relationship [sn_csm_case_types_product_service_rel]	This table stores the products that are linked to a service definition.

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Tables added with case types (continued)

Table	Description
	For more information about these relationships, see Associate a product with a service definition.
Service to Service Relationship [sn_csm_case_types_service_to_service_rel]	This table stores relationships that have been configured between services. For example, related services that have been added to a service definition.
Catalog Service Relationship [sn_csm_case_types_catalog_service_rel]	This table stores the catalog items that are linked to a service definition. For more information, see Configure catalog items for a service definition.
Service Definition User Criteria [sn_csm_case_types_service_user_criteria]	This table stores the user criteria that has been configured for a service definition record. The system uses this criteria to filter the services that are available to users in the service selector when creating a case. For more information, see Configure user criteria for a service definition.
Service Definition Customer Criteria [sn_csm_case_types_service_customer_criteria]	This table stores the customer criteria that has been configured for a service definition record. The system uses this criteria to filter the services that are available to customers. For more information, see Configure customer criteria for a service definition.

Roles installed with case types

The following service definition roles are installed with the Customer Service Case Types (com.snc.csm_case_types) plugin.

Roles installed with case types

Role	Description	Contains roles
Service definition admin [sn_csm_case_types.service_definition_admin]	Administrator role for the Customer Service case types tables. Users with this role can view, create, update, and delete service definitions, service definition categories, and service definition category relationships.	• sn_csm_case_types.service_definitio • sn_service_org.service_criteria_delet
Service definition manager [sn_csm_case_types.service_definition_manager]	Manager role for the Customer Service case types tables. Users with this role can view, create, and update service definitions, service definition categories, and service definition category relationships.	• sn_csm_case_types.service_definitio • sn_csm_case_types.service_definitio • sn_service_org.service_criteria_write • sn_service_org.service_criteria_creat • sn_service_org.service_criteria_read
Service definition viewer	Users with this role can view service definitions, service definition categories, and service definition category relationships.	sn_service_org.service_criteria_read

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Roles installed with case types (continued)

Role	Description	Contains roles
[sn_csm_case_types.service_definition_viewer]		
Service definition report viewer [sn_csm_case_types.service_definition_report_view]	Provides report view access to service definition related tables.	None
Service definition all table viewer [sn_csm_case_types.service_definition_all_table_viewer]	Provides view access to the service definition tables. Users with this role can view service definitions, service definition categories, and service definition category relationships.	None

Properties installed with case types

The following properties are added with the Customer Service Case Types plugin. These properties control the version of the case type selector screen that is displayed to agents. For more information, see Case type selector screen.

Properties installed with case types

Property	Description
sn_csm_case_types.case_type_single_field_select	Set this property to true to enable the case type single select feature in CRM Workspace. When enabled, an agent can use this feature to create a case of a specific type with a single selection in the case type selector screen. • **Type:** true | false • **Default value:** false • **Location:** System Property [sys_properties] table
sn_csm_case_types.service_definition_select	Set this property to true to enable the Product Service Select version of the case type selector screen. When enabled, an agent can use this screen to create a record based on the selected product or service. • **Type:** true | false • **Default value:** true • **Location:** System Property [sys_properties] table This property overrides the *sn_csm_case_types.case_type_single_field_se* property.

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Properties installed with case types (continued)

Property	Description
	• When set to true, the system displays the Product Service Select screen. • When set to false, the system uses the value of the *sn_csm_case_types.case_type_single_field_s* property. • If both properties are set to true, the *sn_csm_case_types.service_definition_selec* property takes precedence. • If both properties are set to false, the system displays the multi-select screen.
sn_csm_case_types.service_definition_select_count	Determines the number of the products and services displayed in the Product Service Select screen. • **Type:** integer • **Default value:** 25 • **Location:** System Property [sys_properties] table
sn_csm_case_types.get_case_types_roles	Stores the admin and agent roles that can access the Case Type Selector and getCaseTypes API. Roles are listed in the **Value** field in a comma-separated list. To add a role, append the role at the end of the list. • **Type:** string • **Default value:** itil,admin,sn_customerservice_agent,sn_customerservice.cor • **Location:** System Property [sys_properties] table

Extension points installed with case types

Extension points enable you to extend the functionality of an application and integrate customizations without altering the application code. Extension points are stored in the Extension Point [sys_extension_point] table.

The CSMServiceDefinitionIntegrations extension point returns a list of products that is available to agents in the **Product** field on Product Service Select version of the case type selector screen. Out of box, this list is based on customer context and displays the sold products and install base items owned by the customer.

To access this extension point, navigate to **All** > **System Extension Points** > **Scripted Extension Points** and select **CSMServiceDefinitionIntegrations**.

To modify this extension point:

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1. Select the **Create implementation** related link on the extension point record.
2. Modify the **Script** field and add an API to return product information.
3. Select **Update**.

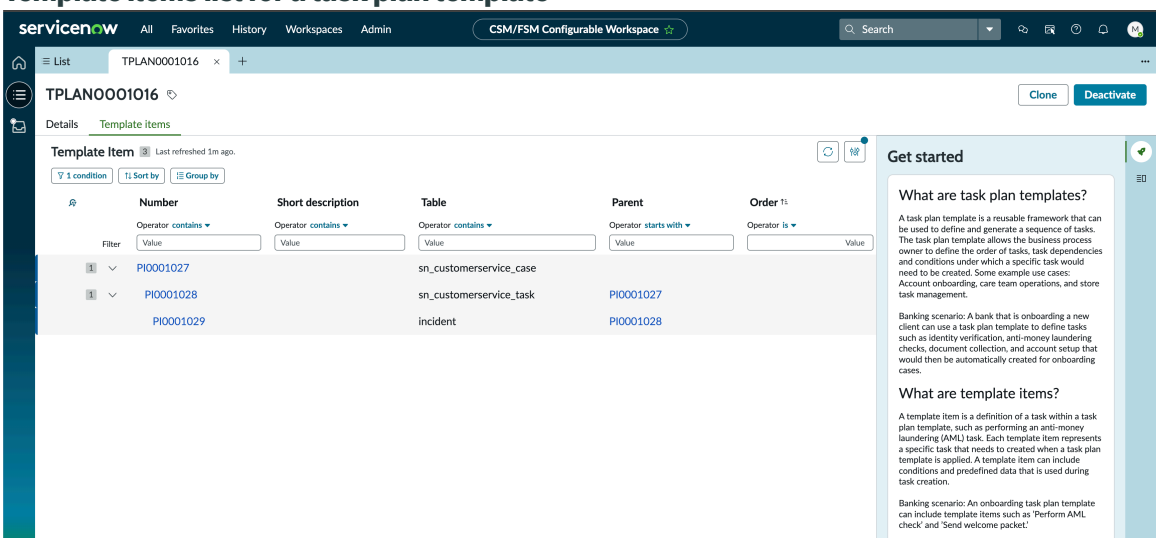
   The system adds the implementation to the Implementations related list on the extension point record.

   Note: The implementation with the lowest **Order** number is used to return the list of products.

Task Plan Templates

Use a task plan template to define the repeatable tasks and records that need to be created for a business process. When the template is applied, these tasks and records are automatically created.

Template items list for a task plan template



A task plan template is a group of tasks and records, called template items, that are automatically created when the template is applied. A task plan template also includes conditions that determine when the template is applicable.

A template item can be a task, a record, or a child task. When you create a template item, you identify the type of item to be created by selecting the table where that item is to be created. For example, to create a case task, select the Task [sn_customerservice_task] table. For each template item, you can create conditions that determine when the template item is created.

A task plan template configuration defines pre-set fields to streamline the process of creating task plan templates.

You can also create a hierarchy of the tasks and records to be created when the task plan template is applied by creating child template items for a template item. For example, you can create a template item that is a case record and then create child template items that are case tasks for that case record.

Defining a process with a task plan template

Business users can define how a business process should be handled by using a task plan template. When creating a task plan template, the business owner can create the following:

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- The task plan template and the conditions for when the template applies.
- The template items to be generated. This can include tasks, child cases, child case tasks, and other records such as work order tasks. Template items can also include attachments. These attachments are available on the tasks created from the template items.
- The task order.
- Conditions that specify when tasks need to be created.

Benefits of task plan templates

Task plan templates enable you to define the repeatable tasks that are routinely performed for specific business processes. When you apply the template, either to an existing case or to a new case, the system automatically creates the tasks defined in the template.

For example, a bank can use a task plan template to onboard new customers. An onboarding task plan template can include tasks similar to the following:

- Gather customer information
- Scan customer documents
- Check customer credit score
- Send welcome packet

Task Plan Templates plugin

Users with the system administrator role can activate the Task Plan Templates (com.sn_task_plan_templates) plugin. The Task Plan Templates application is available from the ServiceNow Store.

The Task Plan Templates application adds the Task Plan Templates module to the application navigator and includes tables and roles. For more information, see the following topics:

- Task Plan Templates tables
- Task Plan Templates roles

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.

Creating task plan templates

Business process owners can create a task plan template in either of the following ways:

- **Manually**: Add the template, template items, conditions, and dependencies field by field. Follow the steps in this section.
- **From an uploaded document**: Upload a process document or diagram and let the AI agentic workflow extract the tasks and dependencies to generate a draft template. For more information, see Create a task plan template from a document.

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Steps for creating a task plan template

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.
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.
Publish the task plan template.	While in the Draft state, you can make changes to the template, template items, and template item conditions. 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.

Editing task plan templates

Once you create a task plan template, you can edit the template, the template items, and the template item conditions.

Steps for editing a task plan template

Step	Explanation
Clone a task plan template.	Clone a task plan template that is in either the Draft or Published state. Select the task plan template number from a task plan template list. Then select **Clone**. The system clones the task plan template, gives it a unique record number, and opens the cloned template in a new tab. The cloned

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Steps for editing a task plan template (continued)

Step	Explanation
	template is also added to the task plan template list.
Clone a template item.	Clone a template item for a task plan template that is in the Draft state. Select a task plan template, select a template item in the Template Items tab, and then select **Clone** on the Template Item form. The system creates a copy of the selected template item, gives it a unique record number, and displays the Template Item form.
Edit a task plan template.	Edit a task plan template that is in the Draft state. • Select the task plan template number from a task plan template list to open the record in a tab. • Select the pencil icon next to the task plan template number to edit the form in a panel. Make the necessary changes and then select **Save** or **Update**.
Edit a template item.	Edit a template item for a task plan template that is in the Draft state. • Select the template item number from the Template Items list to open the record in a tab. • Select the pencil icon next to the template item number and edit the form in a panel. Make the necessary changes and then select **Save** or **Update**.

Applying task plan templates

You can apply task plan templates to existing cases or to new cases. When a case is created based on a task plan template, the template items are automatically created as defined in the template.

Task plan templates can be applied manually or automatically to an existing entity.

Before generating records for multiple business organizations, populate the tracking fields on each template item, or on the template item configuration that the template item references. These fields record the template item, the template execution, and the business organization for each generated record. For more information, see Template item form.

When records are generated for multiple business organizations, task dependencies and document references defined on the template items carry through to the generated records. Dependencies are paired within each business organization, and each generated record

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keeps the document references of its source template item. For more information, see Task Dependencies for Task Plan Templates and Document References in Task Plan Templates.

Get Started tab in the contextual side panel

The Get Started tab in the contextual side panel in CRM Workspace displays information about task plan templates, template items, and template item conditions.

This tab is available for the following tables:

- Task Plan Template [sn_task_plan_template]
- Template Item [sn_task_plan_template_item]
- Template Item Condition [sn_task_plan_template_item_condition]

Information in the Get Started tab

Content	Description	Example
Task plan template	A reusable framework that you can use to define and generate a sequence of tasks. Use a task plan template to define tasks and the conditions under which those tasks need to be created.	A bank that is onboarding a new client can use a task plan template to define tasks such as identity verification, AML checks, document collection, and account setup. Those tasks can then be automatically created for onboarding cases.
Template item	A task or a record, such as a case or child case, that is created for a task plan template. Each template item represents a specific task that needs to created when a task plan template is applied. A template item can include conditions and predefined data that is used during task creation.	An onboarding task plan template can include template items such as the following: • Perform anti-money laundering (AML) task • Send welcome packet
Template item conditions	Conditions that determine if a task should be created when the task plan template is executed. The conditions run against the template item's table. If all conditions return as true, then the task gets created.	A template item to "Send welcome packet" can include a condition such as "If applicant address is not empty." Based on this condition, if the applicant has provided an address, a 'Send welcome packet" task would be created.

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Task plan templates states and actions

A task plan template can be in one of the following states: Draft or Published. It can also be active or inactive. Each state includes an available set of user actions.

Draft state

A task plan template is in the Draft state when it is first created.

Task plan templates created using ServiceNow Otto or AI-assisted creation also start in the Draft state.

When a task plan template is active and in the Draft state, the following actions are available.

Available user actions for task plan templates in the Draft state

Action	Description
Edit	Select a task plan template in the list and then select **Edit** to open the task plan template record and make changes. Editing a task plan template requires the sn_task_plan.creator role.
Clone	Select a task plan template in the list and then select **Clone** to create a copy of the template, the template items and attachments, and the template item conditions. Cloning a task plan template maintains the template item hierarchy along with the attachments and conditions. The cloned task plan template is created in the Draft state and is active. Cloning a task plan template requires the sn_task_plan.creator role. **Note:** You can clone one task plan template at a time. If you select more than one task plan template in the list, the **Clone** action is not available.
Delete	Select one or more task plan templates in the list and then select **Delete**. Only task plan templates in the Draft state can be deleted. Deleting a task plan template requires the sn_task_plan.delete role. **Note:** The system displays a confirmation message when deleting a template. When the user confirms the action, the system deletes the task plan template.
Publish	Selecting **Publish** moves an active task plan template from the Draft state to Published. When a task plan template is in the Published state, the fields on the Task Plan Template form are read-only. Publishing a task plan requires the sn_task_plan_template.writer role. **Note:** The system displays a confirmation message when publishing a task plan template. When the user confirms the action, the system publishes the task plan template.

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Published state

A task plan template is in the Published state when it is ready to be applied and a user with the writer role has published it.

When a task plan template is active and is in the Published state, the following actions are available.

Available user actions for task plan templates in the Published state

Action	Description
Clone	Select the task plan template in the list and then select **Clone** to create a copy of the template, the template items and attachments, and the template item conditions. Cloning a task plan template maintains the template item hierarchy along with the attachments and conditions. The cloned task plan template is created in the Draft state and is active. Cloning a task plan template requires the sn_task_plan.creator role. **Note:** You can clone one task plan template at a time. If you select more than one task plan template in the list, the **Clone** action is not available.
Deactivate	Select the task plan template in the list and then select **Deactivate** to disable the **Active** field on the Task Plan Template form. Deactivating a task plan template requires the sn_task_plan_template.writer role. **Note:** The system displays a confirmation message before deactivating a task plan template. When the user confirms the action, the system disables the **Active** field on the task plan template.

Template item actions

Template items have an available set of actions, including row-level actions that enable users to create new template items and to edit, clone, and delete template items.

The Task Plan Template form includes a Template Items tab that shows the included template items in a hierarchical view. This view shows the relationship between case tasks, child cases, child case tasks, and other records.

From the Template Items tab, users can select **New** to create new template items. This action is available when the task plan template is in the Draft state.

The following row-level actions are available for template items when the task plan template is in the Draft state.

Row-level actions for template items

Action	Description
Edit	Select the pencil icon to edit a template item inline in a pop-up window. Make the desired changes and then select **Update**.

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Row-level actions for template items (continued)

Action	Description
New Child	Select the additional items icon next to the template item and then select **New Child**. This creates a new child record with the selected template item as the parent item.
Clone	Select the additional items icon next to the template item and then select **Clone**. This clones the template item to create a new template item. This includes the hierarchy of the selected template item along with the conditions and attachments of the selected template item. The cloned template item is added to the Template Items tab on the Task Plan Template form. This action requires the sn_task_plan.creator role.
Delete	Select the additional items icon next to the template item and then select **Delete**. This deletes the selected template item. This action requires the sn_task_plan.delete role. **Note:** The system displays a confirmation message before deleting the template item. When the user confirms the action, the system deletes the template item, its child items, the template item conditions, and attachments.

Actions for template item conditions

Actions for template item conditions

Action	Description
New	Select a template item and then select the Conditions tab to display the Template Item Condition list. Select **New** to create a new template item condition. Fill in the fields on the Template Item Condition form and then select **Save**.
Delete	Select a template item and then select the Conditions tab to display the Template Item Condition list. Select one or more template item conditions and then select **Delete**.

Create a task plan template

Create a task plan template that includes template items, such as tasks, that are automatically created when the task plan template is applied.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator role

About this task

Task plan templates include conditions that determine when the template applies.

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Note: As part of creating a task plan template, you can select a target record. If you select a target record, the task plan template is applied when a case or task matching the task plan condition is created.

After creating a task plan template, you can create the template items, such as case tasks, work order tasks, and child cases. Template items can also include conditions that determine when a template item should be created as well as attachments.

You can also clone a task plan template.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **All Task Plan Templates**.
2. Select **New**.
   A Task Plan Template form opens in a new tab. The template is active and is in the Draft state.
3. Fill in the fields on the Task Plan Template form.

   a. If there are task plan template configurations created, select one from the **Task plan template configuration** field.
   The task plan template configuration pre-fills the **Short description** and **Target record** field. For more information about task plan template confgurations, see Create a task plan template configuration.

   b. Provide a **Name** and **Short description** for the task plan template.

   c. **Optional:** The **Target record** identifies the table that the task plan template is applied to.

   For more information about these fields, see Task Plan Template form.
4. Select **Submit**.
   The system saves the task plan template record and adds the Template items tab to the form. Use the Template Items tab to define the tasks such as case tasks or work orders that you want to be generated when the task plan template is applied.

What to do next

After creating a task plan template, you can create template items for that template.

Create a task plan template from a document

Create a draft task plan template by uploading a process document or diagram. An Agentic workflow extracts the tasks and dependencies and generates the template for you to review.

Before you begin

Role required: sn_task_plan.creator

About this task

Instead of building a task plan template manually, upload a process document (such as an SOP or process diagram). The Agentic workflow identifies the tasks and dependencies and generates a draft template for you to review before publishing.

The workflow supports image, PDF, and DOCX files. You can create a template in one of two ways, described in the following step.

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Procedure

1. Do one of the following.
   - On any Task Plan Templates list, select **Create Template**. Because this request is tied directly to the workflow, the panel opens and prompts you to upload a document.
   - Open the ServiceNow Otto panel from the top navigation, available on any page. Because this panel isn't tied to a specific workflow, describe what you want — for example, "create a template from a document" — and ServiceNow Otto suggests the matching workflow.

     The agent prompts you to upload a document that describes the process.
2. Select **Click here to upload a file** and select an image, PDF, or DOCX file that describes the process.

   The Agentic workflow processes the uploaded file, extracts the tasks, and identifies the dependencies between them.
3. **Optional:** If the workflow finds similar task plan templates, review them before continuing.

   (Optional) Make sure the Task Plan Template table is indexed for AI Search. If it isn't indexed, the workflow doesn't detect or display similar templates.
   - Select `No` to use one of the existing templates instead. The workflow ends the request.
   - Select `Yes` to continue creating a new template.
4. Review the draft template summary that the agent returns.

   The summary shows the template created, along with its template items and dependencies.

Result

The task plan template is created in the Draft state. You can edit the template items, template item conditions, and dependencies before you publish the template.

What to do next

Review and edit the draft template as needed. For more information about the actions available in the Draft state, see Task plan templates states and actions.

Customize the task plan template AI workflow for your table

The out-of-the-box Task Plan Template Creation workflow creates task plan template items in the Task [task] table. To create items in a different table, such as the Case `[sn_customerservice_case]` table or a telecom order table, clone the workflow use case and update its base plan.

Before you begin

Role required: admin

About this task

The out-of-the-box **Task Plan Template Creation** workflow is configured with the following target values:

- **target_record**: `task`
- **table** for template items: `task`
- **parent_field_identifier** for each task: `parent`

To generate template items in a different table, clone the use case and update these values in the cloned copy. Some example target tables for different domains:

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- Customer service case management: the Case [sn_customerservice_case] table or the Case Task [sn_customerservice_task] table
- Telecommunications order management: telecom order tables
- Retail service management: retail case tables

Note: Clone the workflow rather than editing the base one. Editing the base use case can cause your changes to be lost during upgrades.

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Use Cases** > **Create and manage** > **Agentic workflows**.
2. Open the **Task Plan Template Creation** workflow.

   The record is in the **Task Plan Template AI Agents** application scope.
3. To clone the workflow, select **Duplicate**.

   The cloned workflow is created as a copy that you can edit without affecting the base configuration.
4. In the cloned workflow, update the **Base plan** field to point to your target table.

   a. Change `Use target_record "task"` to your target table name.

      For example, `Use target_record "sn_customerservice_case"`.

   b. Change `Set "table" field for the template items as "task"` to the table where each template item must be created.
      The out-of-the-box workflow maps everything to the Task [task] table for simplicity. You can instead define multiple rules, mapping different item categories to different tables. For example, map order items to an order table and change items to a change table.

   c. Change `Set "parent_field_identifier" for each task as "parent"` to the parent field name on your target table.
5. Save the cloned workflow.

Result

When users run the task plan template AI workflow, the agent creates template items in the table specified in the cloned use case.

What to do next

Test the customized workflow by uploading a sample document. For more information about running the workflow, see Create a task plan template from a document.

Create a template item

Create one or more template items, such as a task or record, for a task plan template. When the task plan template is applied, these records are automatically created.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator role

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About this task

Template items include tasks, child cases, and child case tasks. You can also create a hierarchy of template items. For example, you can create a case as a template item and then create case tasks as child template items for that case.

You can create new template items or you can clone existing template items. When you clone a template item, it clones the hierarchy of that item.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **Draft Task Plan Templates**.
2. Select a task plan template record number to display the record.
3. Select the Template items tab.
4. Select **New** in the Template items tab header.
   The template item form opens in a new tab. The **Number** field displays the number of the template item. The **Task plan template** field displays the number of the parent task plan template.

   For more information about these fields, see Template item form.
5. Provide a brief description of the template item in the **Short description** field.
6. Select a table from the **Table** field in which the system creates the template item record when the task plan template is applied.
   For example, if the template item is a case task, the system should create that item in the Case Task table [sn_customerservice_task].
7. Specify the fields and the field values that the system should use to create the template item record.
8. **Optional:** Add an attachment to the template item.
9. Select **Save**.
   The system creates the template item record and adds the Conditions tab and the Child Template Items tab to the form.

What to do next

After creating a template item, you can create one or more conditions for the template item. You can also create child template items for a template item.

Create a child template item

Create one or more child template items, such as a task or record, for an existing template item to create a task hierarchy.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator role

About this task

Template items can have child template items. By creating child template items, you can create a hierarchy of template items. For example, you can create a case as a template item and then create case tasks as child template items for that case.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **Draft Task Plan Templates**.
2. Select a task plan template record number to display the record.
3. Select the Template items tab.

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4. Select **New**.
   The template item form opens in a new tab. The **Number** field displays the number of the child template item. The *Task plan template* field displays the number of the parent task plan template.
5. Use the **Search** icon to choose a parent template item.
6. If applicable, choose a configuration in the **Template item configuration** field.
   The corresponding field values are pre-filled. You can modify the field values if needed.
7. Provide a brief description of the template item in the **Short description** field.
8. Select a table from the **Table** field in which the system creates the child template item record when the task plan template is applied.
   For example, if the child template item is a case task, the system should create that item in the Task table [sn_customerservice_task].
9. Specify the fields and the field values that the system should use to create the template item record.
10. **Optional:** Add an attachment to the template item.
11. Select **Submit**.
    The system creates the child template item record and adds the record to the Child Template Items tab on the template item form.

What to do next

After creating a child template item, you can create one or more conditions for the template item.

Create a template item condition

Create conditions for a template item after the template item has been created. These conditions determine when a template item is created when the task plan template is applied.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator

About this task

You can create conditions for template items after the items have been created and the Template Item Conditions tab appears on the Template Item record.

By default **Advanced** is unchecked, you select one of the following:

- The same table as the **Target record** in the task plan template.
- The parent template item's table.

When **Advanced** is selected, this field instead lists tables that share the reference selected in the **Base table mapping field**.

You can also delete a condition by selecting the condition in the Template Item Conditions list and then selecting **Delete** to remove the item from the list..

Procedure

1. Navigate to **All** > **Task Plan Templates** > **Draft Task Plan Templates**.
2. Select a task plan template record number to display the record.
3. Select the Template items tab.
4. Select a template item record.
5. Select the Conditions tab.

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6. Select **New**.
   The template item condition record opens in a new tab. The **Template item** field displays the number of the parent template item.

   For more information about these fields, see Template item condition form.

7. **Optional:** Select the **Advanced** check box to instead configure the condition on a table that shares a reference with the target table or parent template item table, rather than on that table directly.

   (Optional) When **Advanced** is selected, the **Condition table** field lists tables that share the reference selected in **Base table mapping field**. Three additional fields appear and are mandatory: **Base table**, **Base table mapping field**, and **Condition table mapping field**.

   A **Change Advanced settings?** confirmation dialog appears. Select **Confirm** to proceed, or **Cancel** to keep the Advanced setting unchanged.

   Skip this step and the next two steps to configure a simple condition, as described in the following steps.

8. If you selected **Advanced**, select the parent template item's table or the task plan template's target record table from the **Base table** field.
9. If you selected **Advanced**, select a reference field on the **Base table** in the **Base table mapping field** field. The **Condition table** field then lists tables that share this same reference.
10. Select a table from the **Condition table** field.
    This is the table on which the condition is applied.

    If you selected **Advanced**, this field lists tables related to your **Base table mapping field** selection instead of the target table or parent template item table.

11. If you selected **Advanced**, select the field on the **Condition table** that matches the reference selected in **Base table mapping field**, in the **Condition table mapping field** field.
12. Select **Add Filter Condition** to choose a condition from the drop down.
    a. Use the operators in the field to set the filtering that you want.
    b. Select **x** to remove a condition.
13. To add additional conditions to filter by, select **Add OR Clause**.
    a. Use the operators in the field to set the filtering that you want.
    b. Select **x** to remove a condition.
14. Select **Submit**.
    The system creates the template item condition record and adds it to the Template Item Conditions tab.

Clone a task plan template

Clone an existing task plan template to create a new template that includes the items, conditions, and hierarchy of the original template.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator role

About this task

When you clone a task plan template, the system creates a new template with a unique record number, sets it to Draft status and active state, adds it to the task plan template list, and opens it in a new tab.

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The cloned template includes the following:

- The template items, including the item hierarchy.
- Template item attachments.
- Template item conditions.
- Child Template Items related list.
- Affected service organizations.
- Document references.

Note: The Clone button is disabled if more than one task plan template is selected.

Procedure

1. Navigate to one of the following lists.
   - **All** > **Task Plan Templates** > **Draft Task Plan Templates**
   - **All** > **Task Plan Templates** > **Published Task Plan Templates**
   - **All** > **Task Plan Templates** > **All Task Plan Templates**
2. Select a task plan template by selecting the check box next to the record number.
3. Select **Clone** from the Edit menu.
   The system creates a copy of the selected task plan template and opens the cloned template in a new tab.

Clone a template item

Clone an existing template item to add to a task plan template.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator role

About this task

Template items include case tasks, child cases, and child case tasks. When you clone a template item, the system clones the selected template item and creates a new template item that includes the hierarchy, conditions, and attachments of the source template item.

Note: This action is only available for task plan templates in the Draft state.

If the source template item has document references or dependencies with other template items, the clone preserves them.

The cloned template item is added to the Template Items tab on the Task Plan Template form.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **Draft Task Plan Templates**.
2. Select a task plan template record number to display the record.
3. Select the Template items tab.
4. Select a template item and then select **Clone** on the Template Item form.
   The system creates a copy of the selected template item, gives it a unique record number, and displays the template item form.

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Task Plan Templates tables

The Task Plan Templates application includes tables that store task plan template, template item, and template item condition records.

The Task Plan Templates application includes the following tables.

Task Plan Templates application tables

Table	Description
Task Plan Template [sn_task_plan_template]	Stores task plan template records. A task plan template defines the plan to create the associated template items, such as case tasks and child cases. A task plan template is a collection of independent template items which can be applied manually or automatically to an existing entity such as a case.
Template Item [sn_task_plan_template_item]	Stores template item records. Template items are the tasks or the records that are created when you apply a task plan template. A task plan template can have multiple template items and template items can have child template items. This structure enables you to define a hierarchy of parent and child records of any task type. You can add attachments to a template item. The attachments are available on the tasks and records created from the template item when the task plan template is applied to a case.
Template Item Condition [sn_task_plan_template_item_condition]	Stores template item condition records. You can add conditions to a template item that determines when a template item is applicable.
Task Plan Template Dependency	Stores the dependency definitions between template items. Each record includes the predecessor, the successor, the dependency type, the minimum and maximum lag times, and the assignment criteria.
Task Plan Template Document [sn_task_plan_template_document]	Stores the document references added to template items.

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Task Plan Templates application tables (continued)

Table	Description
	When a task plan template generates records, each generated record receives the document references of its source template item.

Related topics

Task Plan Template form

Template item form

Template item condition form

Document References in Task Plan Templates

Document references in task plan templates allow documents to be associated with tasks or cases and made available to task owners. This capability supports adding, viewing, and managing documents within template items, ensuring task owners have access to the required files when working on assigned tasks or cases.

The following roles can add, view, and manage documents—such as PDFs, Word documents, images, and PowerPoint files to task plan template items. Document management capabilities follow existing access controls, ensuring that only authorized users can modify document content.

- `sn_task_plan.admin`
- `sn_task_plan.creator` (draft templates only)
- `sn_task_plan.writer`
- `sn_task_plan.viewer` (viewers can only view documents and cannot create, edit, or delete document references).

Document references are stored in the#**Task Plan Template Document** (`sn_task_plan_template_document`) #able and are available through form views and related lists, depending on the template state and user permissions. ACLs ensure proper read and write control across forms and lists.

When a published task plan template is applied, the system automatically adds all the document references from the template items to the newly created tasks. These references are associated with the corresponding tasks, ensuring that access permissions and business logic operate as expected, and preventing regeneration of documents during template application. This capability allows task owners to easily access all the documents required to complete their assigned tasks.

Document references are maintained when a task plan template generates multiple cases or case tasks at once. For example, across multiple stores or service organizations. Each generated record retains the same references as its source template item.

Key Features:

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- The Task Plan Template feature (`sn_task_plan_feature`) stores feature definitions, such as **Document Support** and **Task Dependency**.
- The Task Plan Template Item feature (`sn_task_plan_template_feature`) links specific features to template items.
- Document Reference Storage: The system uses the `sn_task_plan_template_document` table to store document references. Visibility and edit rights depend on ACLs and template state (draft or published).

Key Benefits:

- The user interface provides a consistent experience for managing task plan features and their associated documents.
- Document handling is secure and aligned with template access controls, ensuring that only authorized users can view or modify attached files.
- The framework supports extensibility for cross-product teams, enabling broader adoption and integration across different organization units.

Add and Manage Document Reference in Task Plan Template Item

Add documents to task plan template items through extensible feature tables. Supported file types include PDFs, Word documents, PowerPoint files, or images.

Before you begin

Roles required: admin, sn_task_plan.admin, sn_task_plan.creator, sn_task_plan.writer
Plugin Id: com.snc.platform_document_management.

Procedure

1. Navigate to **All** > **Task Plan Template.**.
2. Select a template which is in **Draft** state
3. Select the template item to which you want to add documents from the **Template Items** related list.
4. From the **Task Plan Template Document** related list, select **New**.

   Note: The **New** option is visible only for templates in **Draft** state, not for those that are **Published**.

5. Confirm that the following information is auto-populated in the form.
   - Select Document
   - Task plan feature auto-populates to *`Documents`* and corresponding task plan template is also auto-populated.
   - Template item is auto-populated from the form.
6. Select **Submit**.

Task Dependencies for Task Plan Templates

Task dependencies define the execution order between tasks, case, and case tasks in a Task Plan Template.

Overview

Task dependencies provide controlled sequencing within the generated records from the template items in the **Task Plan Template Dependency** table. By defining predecessor and

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successor relationships, the tasks can start at the correct time reducing ambiguity for agents. Administrators and users with edit permissions can add or update dependencies when the template is in the **Draft** state. Users with read-only access can view dependency information after the template is shared.

All dependency records are stored in the **Task Plan Template Dependency** table. Each record includes the predecessor, successor, dependency type, minimum and maximum lag times, use max lag time, and assignment criteria.

The user interface provides list views, form views, and a related list on the template record to support dependency management. UI policies dynamically show or hide fields based on user selections. For example, selecting **Use maximum lag time** displays the **Maximum lag time** field, allowing users to specify the maximum lag duration.

The **Assignment criteria** field contains the drop-down list with options such as **Same agent** and **Same day, same agent**. Built-in validations prevent circular, self-referencing, or duplicate dependencies. Role-based access controls determine who can view, create, update, or delete dependency records, depending on the user's role and the template state.

option.

Apply Template is available only after a task plan template is published. When selected, it generates task records in the corresponding tables and populates the defined dependencies between template items in the **Task Dependency** table. Task plan template users and administrators can add, edit, or remove dependencies using the provided UI controls only when the template is in **Draft** state. When a dependency is removed, the system displays a custom confirmation message indicating that only the dependent tasks are affected.

You define a dependency once, between two template items. When records are generated from a published task plan template, the dependency creates a pair between the corresponding predecessor and successor records. When records are generated for multiple business organizations, a separate pair is created for each business organization: a predecessor is paired only with a successor that was generated for the same business organization, never with a record generated for another business organization.

The predecessor and the successor do not need to be created in the same target table. Pairing works across target tables, such as a case task that depends on a case.

Task dependencies help ensure clear and predictable task sequencing and support multiple dependency types through minimum and maximum lag times.

#**Apply Template** e items

Add and Manage Task Dependencies

Add, edit, and manage dependencies within template items so that tasks execute in the correct sequence and follow defined dependency rules.

Before you begin

Role required: admin, task plan template user

- The template must be in **Draft** state to create or modify dependencies.
- The user must be granted edit access permissions.

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Procedure

1. Navigate to **All** > **Task Plan Template.**.
2. Open a task plan template.
3. In the **Task Plan Template Dependencies** related list, select **New**, or open the **Dependencies** form.
4. Complete the required fields, including **Predecessor**, **Successor**, and **Dependency Type**.
5. Enter the minimum and maximum lag times, if applicable.
6. Select **Save** to create the dependency.

   Apply the template to generate tasks with dependencies:

7. Open the record where you want to apply the template.
8. Select **Apply Template**.
   The system generates task records based on the template items. Using the dependency rules configured in the **Task Plan Template Dependency** table, corresponding dependency relationships are created between the generated tasks in the *sn_task_dependency_m2m* table.

Add dependencies between template item

Add dependencies between template items in a task plan template to control the sequence in which tasks are available to agents after the template is applied.

Before you begin

Roles required: sn_task_plan.viewer, sn_task_plan.navigation_menu, sn_task_plan.admin

Plugin IDs: com.sn_task_plan_templates, com.snc.task_dependency, and com.snc.customerservice.demo.

Confirm that the following conditions are met before you start:

- The task plan template is in Draft state. You can add or edit dependencies only while the template is in **Draft** state.
- The template contains at least two template items to link as a predecessor and a successor.

Task dependencies define the order in which agents act on tasks generated from a task plan template. All tasks are created at the same time when the template is applied. Dependencies determine when a successor task are available based on the status of a predecessor task and any configured time constraints.

Dependencies control the order in which agents can act on those tasks after generation. You can set how strictly a dependency is enforced and add an optional time offset between tasks.

You can define the following dependency types, which determine when a successor task becomes active:

Successor task active status

Dependency type	Status
Finish to Start	The successor task is active after the predecessor task is completed.
Start Together	The successor task is active at the same scheduled time as the predecessor task.

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Successor task active status (continued)

Dependency type	Status
Start after Start	The successor task is active when the predecessor task starts.

Procedure

1. Navigate to **All** > **Task Plan Template Workspace**.
2. Open a task plan template you want to edit and confirm that the status field shows as **Draft**.
3. Select the **Dependencies** tab to view the dependency map.
4. Select **New Dependency** and complete the required fields:

New dependency form

Field	Description
Predecessor	Select the template item that has to be acted on first.
Successor	Select the template item that follows the predecessor.
Dependency Type	Select dependency type; Finish to Start, Start Together, or Start after Start.
Assignment Criteria	Select the agent assignment criteria. Options are: ○ None ○ Same agent ○ Same day, same agent
Minimum Lag Time	Enter the minimum time before the successor task is available, using the days, hours, minutes, and seconds fields.
Maximum Lag Time	Enter the maximum time allowed before the successor task is available, using the days, hours, minutes, and seconds fields.

5. Select **Save**.

   A confirmation message indicates that the dependency is created and the dependency map updates to reflect the relationship between template items.

   Note: If the dependency condition is not met, a warning appears on the successor task when opened. Agents can dismiss the warning and continue.

Edit or delete a dependency

Edit the fields of an existing dependency or remove it from the dependency map in a task plan template.

Before you begin

Role required: sn_task_plan.writer.

Procedure

1. Navigate to **All** > **Task Plan Template Workspace**.
2. Open the template in **Draft** state.

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3. Select the **Dependencies** tab.
4. Select the dependency you want to edit or delete.
5. Perform one of the following actions:
   - To edit: update the required fields and select **Save**.
   - To delete: select **Delete** and confirm the action.

   A success message confirms the action. The dependency map updates to reflect the change.

Flow-based automation for task plan template items

A task plan template item stamps its number on each record it creates. A flow can use that stamped value as a trigger condition, so the flow runs automatically for the records that one specific template item creates.

Overview

Some steps in a task plan need work that a task plan template cannot do on its own. For example, a router setup plan can include an address verification step, where an external system must confirm the customer address before the next step starts.

You can run a flow for an individual step in a task plan. A template item does not store a reference to a flow. Instead, the template item stamps its number on every record it creates, and the flow uses that stamped value as its trigger condition. Because the flow is triggered by the record, its actions can do anything a flow can do, including calling a subflow or an AI agent.

Key benefits

- Automates individual steps of a task plan without rebuilding the whole process as a flow.
- Removes the need for an agent to start a flow manually after the task is created.
- Runs a different flow for each template item in the same task plan.
- Calls an existing subflow or an AI agent from the triggered flow.

How it works

The following describes the general behavior of a flow that runs for a template item:

1. The target table of the template item has a reference field that points to the template item.
2. The **Template item field** field on the template item is set to that reference field, so the template item stamps it on each record it creates. For more information, see Template item form.
3. A flow is created on the target table with a trigger of **Created** and a condition that matches the number of the template item.
4. When the task plan template is applied, the template item creates its record and the system stamps the template item number on that record.
5. The new record meets the trigger condition, and the flow runs its actions. For example, the flow can set fields on the new task, notify the assigned agent, or hand the work to an AI agent.

Considerations

- The trigger condition matches one template item number, so a flow created for one template item does not run for any other template item.
- The reference field must exist on the target table of the template item before the template item can stamp it.

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Related topics

Trigger a flow from a task plan template item

Template item form

Trigger a flow from a task plan template item

Configure a flow to run automatically when a task plan template item creates a record. A single step of a task plan can be completed by a flow, a subflow, or an AI agent.

Before you begin

Role required: `sn_task_plan.admin` or `sn_task_plan.creator` role to configure the template item, and a role that allows you to create and activate flows in Workflow Studio.

- A task plan template with at least one template item. Note the number of the template item that the flow must run for, such as PI0001001.
- A reference field on the target table of the template item that points to the Template Item table `[sn_task_plan_template_item]`. This field is available by default on some tables. If the target table does not have it, create it before you start.

About this task

Use this procedure when one step of a task plan needs work that the task plan template can't do on its own. Examples include validating data in an external system or handing the task to an AI agent.

You configure the template item to stamp its number on each record it creates, and then create a flow that uses that stamped value as its trigger condition. For more information, see Flow-based automation for task plan template items.

Procedure

1. Configure the template item to stamp its number on the records it creates.

   a. Navigate to **All** > **Task Plan Templates** > **Draft Task Plan Templates**.

   b. Select a task plan template record number to display the record.

   c. Select the **Template items** tab and open the template item that the flow must run for.

   d. In the **Template item field** field, select the field on the target table that references the template item.
   For more information about this field, see Template item form.

   e. Select **Save**.

2. In Workflow Studio, create a flow.
3. Define the trigger for the flow.

   a. In the **Trigger** field, select **Created**.

   b. In the **Table** field, select the target table of the template item.

   c. Add a condition where the reference field that you selected in step 1 is the number of the template item.

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For example, if the target table is the Task [task] table and the template item is PI0001001, the condition is **[Template Item] [is] [PI0001001]**.

d. Select **Done**.

4. Add the actions that the flow must perform, and then select **Done**.
   The actions can update the record that triggered the flow, call an existing subflow, or call an AI agent. For example, a flow can set the **Assigned to** and **Priority** fields on the new task and then send an email notification to the assigned agent.

   To pass the new record to a subflow, map the task record from the trigger to the subflow input.

5. Save and activate the flow.
6. **Optional:** Repeat this procedure for each template item in the task plan template that needs its own flow.

Result

When the task plan template is applied, the template item creates its record and the system stamps the template item number in the reference field on that record. The record then meets the trigger condition of the flow, and the flow runs its actions.

What to do next

To confirm that the flow ran, open the record that the template item created. The reference field displays the number of the template item, and the fields that the flow updates display their new values.

Task Plan Templates roles

Roles included with the Task Plan Templates application enable users to view, create, and edit task plan templates, template items, and template item conditions. Users can use these defined templates to automatically create tasks, child cases, and child case tasks for different types of cases.

The following granular roles are included with the Task Plan Templates plugin (com.sn_task_plan_templates).

Granular roles installed with the Task Plan Templates application

Role	Description	Contains roles
sn_task_plan.admin	Can create, view, update and delete records in the following table: • Task Plan Category [sn_task_plan_category] • Task Plan Template Configuration [sn_task_plan_config] • Task Plan Configuration Category	• sn_task_plan.creator • sn_task_plan.delete • sn_task_plan.report_viewer • sn_task_plan.navigation_menu

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Granular roles installed with the Task Plan Templates application (continued)

Role	Description	Contains roles
	[sn_task_plan_config_category] • Task Plan Template [sn_task_plan_template] • Task Plan Template Access [sn_task_plan_template_access] • Task Plan Template Category [sn_task_plan_template_category] • Task Plan Template Execution [sn_task_plan_template_execution] • Template Item [sn_task_plan_template_item] • Template Item Condition [sn_task_plan_template_item_condition] • Template Item Configuration [sn_task_plan_template_item_config]	
sn_task_plan.viewer	Can view information in the following tables: • Task Plan Template [sn_task_plan_template] • Template Item [sn_task_plan_template_item] • Template Item Condition [sn_task_plan_template_item_condition]	
sn_task_plan.writer	Can view and update information in the following tables: • Task Plan Template [sn_task_plan_template] • Template Item [sn_task_plan_template_item] • Template Item Condition [sn_task_plan_template_item_condition]	sn_task_plan.viewer

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Granular roles installed with the Task Plan Templates application (continued)

Role	Description	Contains roles
sn_task_plan.creator	Can create records in the following tables: • Task Plan Template [sn_task_plan_template] • Template Item [sn_task_plan_template_item] • Template Item Condition [sn_task_plan_template_item_condition] This role is also required to run the task plan template creation AI agent.	sn_task_plan.writer
sn_task_plan.delete	Can delete records from the following tables: • Task Plan Template [sn_task_plan_template] • Template Item [sn_task_plan_template_item] • Template Item Condition [sn_task_plan_template_item_condition]	sn_task_plan.viewer
sn_task_plan.report_viewer	Can view the task plan template reports.	
sn_task_plan.navigation_menu	Can view the Task Plan Templates lists.	sn_task_plan.viewer

Sharing task plan templates

Sharing task plan templates ensures that only authorized users can create, edit, and manage templates. It involves setting access controls, defining roles and responsibilities.

Sharing task plan template overview

Effective sharing of task plan templates helps organizations manage ownership, sharing, and access securely and efficiently. It defines the responsibilities of admin and owner, and supports a seamless experience for users interacting with templates.

The sharing task plan template capability provides secure, efficient template management, and role-based controls for all member types involved.

Sharing task plan template features include;

- Role-based access control
- Ownership and sharing rules
- Global template settings
- Notifications when access is granted
- API and ACL configurations for automated access provisioning

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Templates can be marked as global or non-global, activated, or deactivated, and shared with users, groups, or service organizations.

Note: Query rules can be used with the CSM plugin to grant access to tables within Task Plan templates. Alternatively, non-query rules are available for scenarios where the CSM plugin is used independently.

Template sharing and access management

Sharing task plan templates is designed to ensure that only authorized users can access, edit, or share templates, maintaining operational integrity and avoid misuse. Access is managed at multiple levels—user, group, service organization, and organization criteria—with each entity able to receive read, write permissions. Member Type is a key field when sharing templates with service organizations or based on organization criteria.

Task plan admin role: (sn_task_plan.admin)

The task plan admin role is responsible for overseeing and managing templates within the system. Admins can set templates as global or non-global, activate, or deactivate templates. Admins can assign access to users, groups, service organizations, or based on organization criteria. Admins have the authority to update template owners and they can apply global sharing rules and validations.

Task Plan Template Access

Field Names	Descriptions
Owner field	Task plan template owners are responsible for sharing templates with users, groups, or service organizations, granting read, write access. They can view and manage access permissions and publish, clone, or deactivate shared templates. Owners can change the owner of a template and to switch a template's status between global and non-global.
User, Groups, Service Org, Service Org Criteria, and Member type fields	Users, groups, service org, and service orgs filtered by organization criteria are able to view and write to shared templates. They can filter and search for templates and receive notifications whenever access is granted. Member Type is a key field enabled only when sharing templates with service organizations or based on organization criteria. Member type enables owners and admins to specify the exact role or type of members like Location Agent, Listed Member. These member type should have access to a template.

Share a task plan template with other users or groups

Share templates and grant access to the template with specific users, groups, or service organization or organization criteria and member type.

Before you begin
Role required: admin

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About this task

If the template is in Draft state, users can edit it. If the template is in a published state, then users cannot make any changes to the template.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **All Task Plan Templates**.
2. Select an existing task plan template.
3. Select **New**.

   A new access record opens with the template number pre-filled.

4. Specify task plan template access field details.

   For access record fields and description see: Task plan template access record

5. Select **Submit** to save the access record.

Task plan template access record

The task plan template access record is created with pre-filled template number. The access fields need to be specified to create and save the task plan record.

Task Plan Template Access Record form

User	User of the template. Search and select a user from the list, or select **New** to create a user.
Group	Group for the template. Search and select a group from the list, or select **New** to create a group. **Note:** On entering or by selecting the user or group name from the list, all other fields are disabled.
Service Organization	Service organization for the template. Search and select a service organization from the list, or select **New** to create a new service organization.
Organization Criteria	Criterion for the template.
Optional	Member type. For example, Location Agent, Listed Member, Location Contributor.
Member Type	Appropriate member type for the service organization criteria. **Note:** This field is enabled only when **Service Organization** or **Organization Criteria** is selected.

Share a task plan template from the workspace

Share a task plan template with specific users, groups, service#organizations, or#organization#criteria directly from the Task Plan Templates workspace.

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Before you begin

Role required: admin (`sn_task_plan.admin`)

Share a task plan template from the Task Plan Templates workspace to control who can view and use the template.#You can share templates in Draft or Published state. The template is private by default and is accessible only to the creator until shared.

The Share button is available to template owners and users with the admin role. Other users can access templates shared with them and can share them only if they are the template#owners.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **All Task Plan Templates**.
2. Open an existing task plan template, or select a template from the list view.
3. Select **Share**.

   The share plan modal opens on the Share plan view.

4. Select the entity type to define access:
   - To share with specific users, select users in the **User** field.
   - To share with specific group, select users in the **Group** field.
   - To share with a service#organization#or a combination of service#organization#and users, select a service#organization#and add users as#required. Optionally, select a #**Member#type** to restrict access to a role within the#organization.
   - To share with users matching#organization#criteria, configure the Service#organization #criteria and Member type fields.
   - To share with all users in the organization, select **Global**.

     Note: Selecting Global option hides the other fields.

5. Select **Confirm**.

Notify users when a task plan template is shared

Notifications ensure that all relevant users, groups, service organizations, and members are promptly informed when a task plan template is shared. Notifications supports operational integrity and transparency in template governance.

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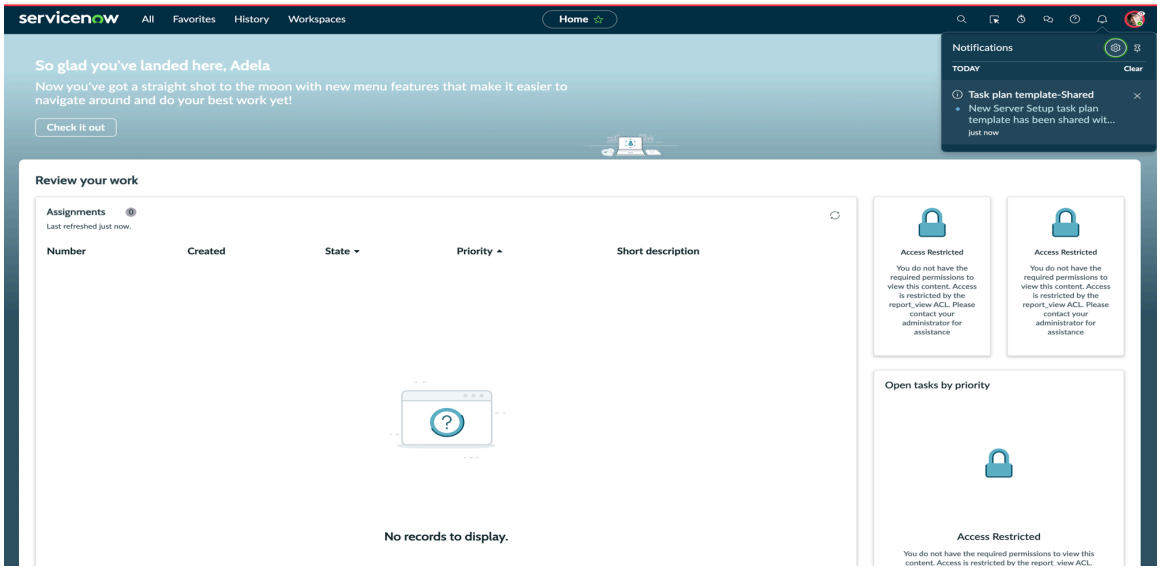
Shared Task Plant Template Notifications



Individual users, groups, service organizations, and members, receive in-app notifications when a task plan template is shared. Notifications are triggered to users, groups, and service organizations based on criteria or roles ensuring that only authorized recipients are informed about updates to template access.

Each notification specifies the template name and is sent directly to the users, groups, or service organizations involved. If the user is on the platform view, the notification redirects to the template record on Platform; if on workspace, it navigates to the template record on workspace. Notification validation ensures that only those with the correct access receive alerts, maintaining both security and relevance.

Owners and admins have the ability to manage access, update ownership.

Note: Notifications are not sent for global templates, maintaining a streamlined experience for users who interact with widely shared resources.

Create a task plan template configuration

Admins can create configurations for task plan templates that pre-fill information in task plan template fields.

Before you begin

Role required: sn_task_plan.admin or sn_task_plan.creator

About this task

When you create task plan template configurations, you streamline the process of creating task plan templates for your team. Configurations pre-fill fields in task plan templates, such as **Target table** and **Description**.

Procedure

1. Navigate to **All** > **Task Plan Templates** > **Administration** > **Task Plan Template Configuration**
2. Add a brief description to the **Short description** field.
3. **Optional:** Add the **Target table** you want to associate with the task plan template.
4. **Optional:** Select an icon to associate with this configuration.
   The icon helps you visually distinguish this configuration from others when selecting a configuration in the **Plan Configuration Picker**.

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5. Check the **Active** checkbox to active the configuration.
6. Select **Submit**.
7. **Optional:** Create template item configurations as children of this task plan template configuration.

   (Optional) You create them from the Template Item Configuration table (`sn_task_plan_template_item_config`). All fields in this table function the same way as the corresponding fields in the Template Item table. For field descriptions, see Template item form.

   To select a template item configuration when you create a template item, the parent task plan template must have its **Template Configuration** field populated, and that task plan template configuration must have associated template item configuration records.

   Note: When you create a template item, if you select a template item configuration, the **Tracking fields** section is hidden. Those fields are then automatically populated from the selected template item configuration record.

8. **Optional:** To apply configuration changes to draft templates or template items already created from it, open the configuration record, make the changes, and select **Save and cascade**.

   (Optional) **Save** applies changes only to templates or template items created going forward. Existing ones are not updated.

   Save and cascade applies changes to all draft templates and template items linked to the configuration. Published templates and items are not affected.

   Note: Save and cascade only applies changes made on the configuration form itself — you can't edit a linked template item directly from the configuration's related list. To change a value on an individual template item, open that item's own form.

Select a plan configuration when creating a task plan template

Use the Plan Configuration Picker to select a pre-defined plan configuration while creating a task plan template and before authoring your template. This ensures that the correct workflow, playbook, and record page settings are applied to the template.

Before you begin

Role required: sn_task_plan.admin, sn_task_plan.creator role

Before creating a task plan template, confirm that at least one plan configuration has been set up on your instance.

About this task

When you create a task plan template, the system may prompt you to select a plan configuration before the template record opens. This selection helps ensure that the template uses the correct workflow and authoring experience.

If an icon has been set on a configuration, that icon is displayed alongside the configuration in the picker to help you tell configurations apart.

Procedure

1. Navigate to **All** > **Task Plan Templates** and select **New**.
   The **Plan Configuration Picker** modal opens, displaying all available plan configurations.

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Note: The plan configuration picker appears only when there is an active entry in the `sn_task_plan_config` table.

2. Review the listed plan configurations and their descriptions.
3. Select the configuration that matches your intended workflow.
   If a configuration is selected, the corresponding field is populated and the associated authoring playbook is loaded, if defined. If no configuration is selected, the task plan template is created without a configuration.
4. Select **Create a Task Plan Template**.
5. Complete the template fields and select **Save** to save the record.

View task plan template executions

View tracking and diagnostic information for every execution of task plan templates in the Task Plan Template Executions table. The information available includes success, failure, and skipped details, along with references for traceability.

Before you begin

Role required: sn_task_plan.viewer

Procedure

1. Navigate to **All** > **Task plan templates** > **Published Task Plan Templates**.
2. Select a task plan template from the list, then navigate to the **Task Plan Template Execution** related list to see the execution record.
3. In the record, view the information for each task plan template execution.
   The information available includes the following.

Task plan template executions

Number	The task plan template execution number
Expected records	The total number of records expected to be created.
Created records	How many records actually created, once the task plan is applied.
Errored records	How many records were not created due to an error encountered somewhere (for example, if there is a business rule preventing insert on the target table of the template item)
Skipped records	How many records were skipped and not created, due to a condition check failing on the Template Item condition record [sn_task_plan_template_item_condition]
Execution status	Status can be `Completed`, `In_progress`, or `Completed with Errors`. If the task plan has been applied, but there are remaining template items yet to be

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	visited/used to create records, then the status is set to `In_progress`. If the task plan has fully been applied with NO errors, then the status is set to `Completed`. If the task plan has fully been applied with NO errors, but some records were skipped, then the status is set to `Completed`. If the task plan has fully been applied with at least ONE error spotted when attempting to create a record using a template item, then the status is set to `Completed with Errors`.

Execution details	This is a field of type JSON. At the bare minimum, if the task plan has been applied and no records have been `"skipped"` or `"errored"`, then the JSON object looks something like this:
	
	`{`
	`Status: "Completed",`
	`ParentRecord: ['CS0001', 'CS0002'],`
	`RequestNumber: TPEX00001`
	`}`
	
	The `Status` key in the JSON object is the same as the `execution_status` field.
	
	The `ParentRecord` key represents the top-level parent record(s) within the newly created hierarchy. It may either represent a singular Glide Record (record existing in the database) that was provided, or an array holding the first level of records created from ROOT template items. Root template items are template items without any parent (top-level).
	
	The `RequestNumber` key points back to the `Number` of the Task Plan Template Execution record.
	
	If there are skipped records or errored records, then the Template Item number of the skipped/errored item is provided. The following is an example where both 'Skipped' and 'Errored' template items were encountered during task plan execution:
	
	`{`
	`Status: "Completed with Errors", //status is set to`

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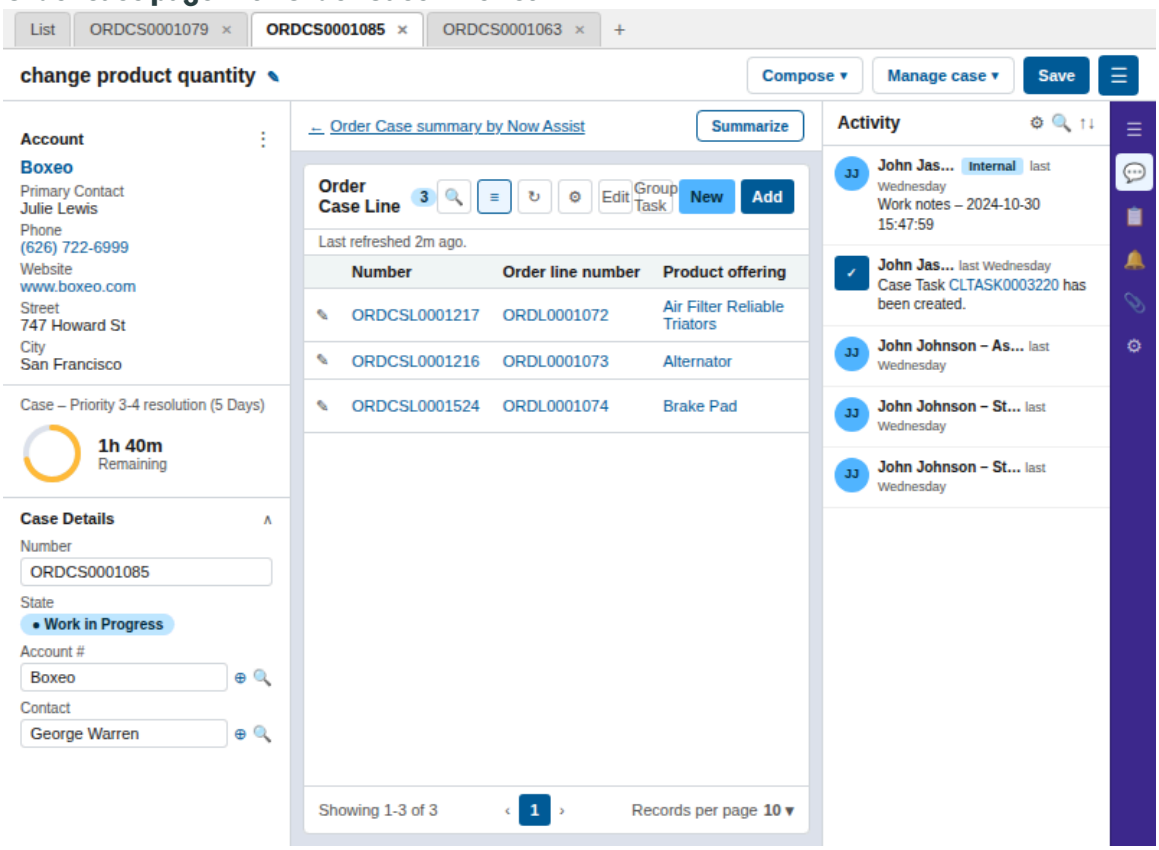
	Completed With Errors, as we encountered an errored record ParentRecord: ['CS0001', 'CS0002'], RequestNumber: TPEX00001, Skipped: ['TP0002', 'TP0005'], Errors: ['TP0008'] }

Order Operations Case Management

The Order Operations Case Management application enables customer service agents to create cases for multiple customer orders or for specific products within an order.

Order case page with Order Case Line list



The Order Operations Case Management application includes the Orders case type. This case type provides the ability to reference multiple orders or order lines as case line items on an order case record. By using case line items, agents can track multiple issues for the same order case and resolve the issues in each case line item independently before resolving and closing the order case.

Use order cases to handle issues such as change order requests, including changes in ordered quantities or expedited shipping requests, or other order-related issues. With this application, agents can:

- Create new order cases and add the requested orders or order lines to the case as case line items.
- Add or remove orders or order lines from existing order cases.

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- Edit existing case line items or create new case line items for order cases.
- Review the changes that have been requested on case line items.
- Create tasks for case line items and assign them to other agents or team members.
- Manage and track the requests and the actions taken to fulfill orders.
- Resolve the individual case line items before resolving the case.

Benefits of using order cases

Businesses can encounter order issues for many reasons such as inventory discrepancies, payment processing problems, or shipping and delivery errors. Order issues can also result from customer input mistakes or changes in customer needs, such as faster shipping or quantity changes. The following table provides some examples of these issues and the resulting order cases.

Order case examples

Reason	Request/Issue	Order case example
Change in quantity	A customer wants to increase or decrease the quantity of an item in their order.	An order case is created to document the request and confirm stock availability.
Change in delivery date	A customer requests to change the delivery date for their order.	An order case is created to coordinate with logistics and confirm the new delivery schedule.
Change in address	A customer needs to update the shipping address after placing the order.	An order case is created to ensure the change is processed before shipping.
Price discrepancy	A customer notices that the price charged differs from the agreed price.	An order case is created to investigate and correct the billing.
Incorrect item ordered	A customer received the wrong product.	An order case is created to initiate the return process and ensure the correct item is sent.
Cancellation of order lines	A customer wants to cancel specific items in their order.	An order case is created to confirm which items can be canceled and update the order accordingly.

Overview of creating an order case

The following table provides an overview of the process for creating an order case. For detailed steps, see Create an order case.

Steps for creating an order case

Step	Description
Creating an order case	An agent can create an order case in the following ways:

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Steps for creating an order case (continued)

Step	Description
	• Selecting **Create case** from a customer order. • Selecting **Create case** from the Order Line Items list on a customer order (after selecting one or more order lines). • Selecting **Create case** from an interaction record. • Selecting **New** from the Order Cases list view.
Selecting a service	After initiating an order case, the agent selects an order-related service from the case type selector modal. This modal displays the services that are available for order cases, such as Sales Order Change Request or Sales Order Dispute.
Filling in details on the Create New Order Case intake form	Selecting **Create case** from the case type selector modal displays the intake form where the agent can enter the following order case details: • **Account**: the account for the order. • **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders. • **Order number**: the order number associated with the order case. • **Short description**: a brief description of the order case. Depending on where the agent creates the order case from, some of these fields are auto filled.
Viewing the order case record	Selecting **Save** on the intake form creates the Order case record in Draft state. From this record, agents can: • Add orders or order lines to the order case. • Delete orders or order lines from the order case. • Create new order case line items. • Edit the details of order case line items. • Assign order case line items to themselves. • Create tasks for order case line items.

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Steps for creating an order case (continued)

Step	Description
Submitting the order case record	Selecting **Submit** on the Order case record moves the order case and the order case line items to the New state. Once in the New state, agents can begin working to resolve the order case. This includes creating tasks for order case line items, assigning them to other agents or team members, and monitoring case progress.

Order Operations Case Management plugin

Order Operations Case Management (com.sn_order_case) is a case management application for handling support requests on orders or order lines. This application enables customers to process order-related services such as inflight order changes, order inquiries, and order dispute requests. It provides an order case type that includes order line items that need changes, workflows, and agent and customer experiences.

The Order Operations Case Management application includes list views for CRM Workspace and Core UI.

- In CRM Workspace, expand the **Order Cases** list category in the Lists tab.
- In Core UI, navigate to **All** > **Customer Order Management** > **Order Cases**.

The Order Operations Case Management application also includes tables, roles, service definitions and other components. For more information, see Components installed with Order Operations Case Management.

The Order Operations Case Management application is available from the ServiceNow Store.

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.

Related topics

Case Lines and Workflows

Order case pages

The Order Operations Case Management application includes record pages that display order cases and order case line items in CRM Workspace.

The Order Operations Case Management application enables agents to create order cases that reference customer orders and order lines. Using order cases, agents can manage and track customer requests and the actions taken to fulfill these requests.

Order cases contain order case line items, which represent either multiple complete orders or multiple order lines from a single order. The Order Operations Case Management application includes the following record pages to display this information in the workspace.

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Order case record pages

Page	Description
Create New Order Case intake page	When an agent initiates an order case and selects a service from the case type selector modal, the system displays the Create New Order Case intake page. The agent uses this page to enter basic information about the order case, such as the account, order number, and scope of request, and then create the case.
Order case record page	The Order case record page displays the order case and a list of the order case line items. The agent uses this page to do the following: • View details about the order case and the order case line items. • Add or remove orders or order lines to the order case as order case line items. • Create new order case line items. • Edit order case line item details. • Create tasks for order case line items.
Order case line item record page	The Order case line item record page displays information about an order case line item. The agent uses this page to view and edit information about the order case line item, including case line item details, ordered and requested quantities, and shipping information.

Order case record page

The Order case record page displays information about order cases and the associated list of order case line items in CRM Workspace.

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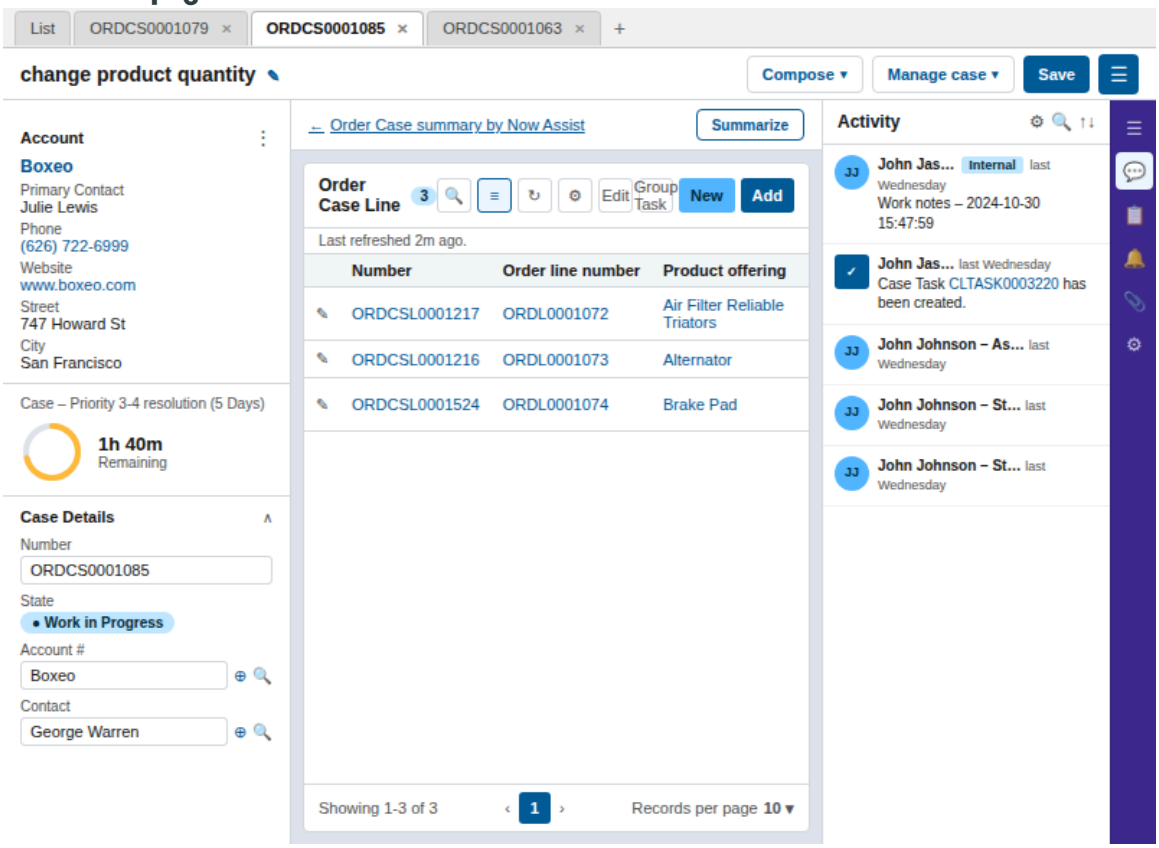
Order case page with Order Case Line list



Customer service agents use this page to do the following:

- View details about the order case and the order case line items.
- Add or remove orders or order lines to the order case as order case line items.
- Create new order case line items.
- Edit order case line item details.
- Create tasks for order case line items.

Order case record page components

The Order case record page includes the following components:

Component	Description
Order case form heading	The form heading displays the order case short description. If there is no short description, it displays the order case number. The form heading also includes the action bar and record tags.
Order case action bar	The action bar contains the actions available to users while working on order case records. The specific actions are determined by factors such as the user role, order case state, and other attributes. • **In-progress Actions**: This icon provides a list of minimized modeless dialogs. It includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email.

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Component	Description
	• **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Manage case**: Perform case management actions such as requesting information or proposing a solution. • **Save**: Save changes to the order case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap.
Account lookup	Agents can use the account lookup component to do the following: • Search for an account. • Link or unlink an account. • Select a reference field on a lookup card, such as a contact name, to open the reference in a sub-tab. • Select a phone number on a lookup card to make a call. The account lookup component displays information in record cards. These cards display contact information and provide quick access to customer details such name, address, and phone.
SLA	Displays active SLAs for the order case, including time remaining, the SLA state, and any breaches.
Case details	The case details component includes collapsible sections for: • Case Details • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL.
Case summarization	The case summarization component appears above the Order Case Line list. When an agent opens an order case, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize order case details. • Generate order case resolution notes. • Generate knowledge articles. • Generate email reply recommendation. **Note:** The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured.

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Component	Description
Order Case Line list	The Order Case Line list component displays the order case line items associated with the order case. Order case line items can be created for orders or order lines. • If an order case is created for one or more orders, the system converts the order header from each customer order to a case line item on the order case. • If an order case is created for one or more order lines from a single order, the system converts the selected order lines from the customer order to case line items on that order case.

Order Case Line action bar	The Order Case Line action bar contains the actions available to users while working on order case line records.
	• **New**: Opens a Create New Order Case Line record in a separate tab. Fill in the fields and select **Save** to add the order case line item to the list.
	• **Add**: Displays one of the following modals depending on the origin of the order case:
	  ○ Add order lines to case
	  ○ Add orders to case
	  Select one or more orders or order lines and then select **Add** to add the selected orders or order lines to the Order Case Line list.
	• **Create task**: Creates a task for the selected order case line item in a separate tab. Fill in the fields on the Create New Case Line Task record and select **Save**.
	
	After selecting an order case line item, agents can edit selected order case line item details, assign an order case line item to themselves, or delete a case line.
	• **Edit**: Displays the details for the selected order case line item in a panel. Make the necessary changes and select **Update** at the bottom of the panel.
	• **Assign to me**: Assigns the selected order case line item to the current user.
	• **Delete**: Deletes the selected order case line item. Select **Delete all** in the confirmation pop-up window.

Activity stream	The activity stream component displays a list of activities occurring on an order case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. The Order case record page uses modeless dialogs for composing comments, work notes, and emails. For more information, see the Composing emails, comments, and work notes section below.

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Component	Description
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Order case record page includes the following tabs. • Activity stream • Attachments • Recommended Actions search • Related Lists • Email Templates • Response Templates • Form Templates For more information about related lists, see the Order case record page related lists section below. **Note:** The Order Operations Case Management application does not include response templates. To configure a response template, see Create or modify a response template.

Order case record page settings

The Order case record page includes the following settings.

Order case record page settings

Setting	Description
Active	Enabling the **Active** check box makes the page available to the selected audience. The Order case record page is active by default. The active setting combined with the page order determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Order case record page is -1000.
Conditions	Conditions determine when a page variant is displayed. The Order case record page has the following condition: **table=sn_order_case** This condition limits the use of the Order case record page to records from the Order Case [sn_order_case] table and tables that extend the Order Case table.
Audience	The audience determines who can see a record page. The Order case record page does not have a specified audience.

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Order case record page settings (continued)

Setting	Description
	For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the *CRM Workspace* experience.
3. In the Record section of the Pages and variants list, select **Front-line case page**.
4. Select **Settings** at the top of the page.

Order case record page related lists

Related lists appear in the Related Lists tab in the contextual side panel.

The related lists component provides access to the order case related lists. This component uses an expandable accordion format. Agents can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

1. Case Tasks
2. Order Case Lines
3. Order Tasks
4. SLAs
5. Emails
6. Draft Emails
7. Knowledge
8. Knowledge Gaps
9. Child Cases

The items in an expanded list are displayed as cards. An expanded list shows one card for each item in the list, up to a maximum of 8 cards.

- Agents can open an item in a sub-tab.
- If a list has more than five items, it includes a Show more option.

Related lists include the following actions:

- **Refresh**: refreshes the items in the list.
- **Create**: opens a blank record in a sub tab that the agent can use to create a new item.
- **View all**: opens a list of records in a sub tab.
- **Show more**: is displayed for lists that have more than five items.

Composing emails, comments, and work notes

The Order case record page uses modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails.

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A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables users to interact with the window content and the overlay content at the same time.

The Compose group of actions on the Order case record page includes:

- Compose Comments
- Compose Email
- Compose Work Notes(Private)

These actions launch the corresponding modeless dialogs (the behavior is the same as the Front-line case page).

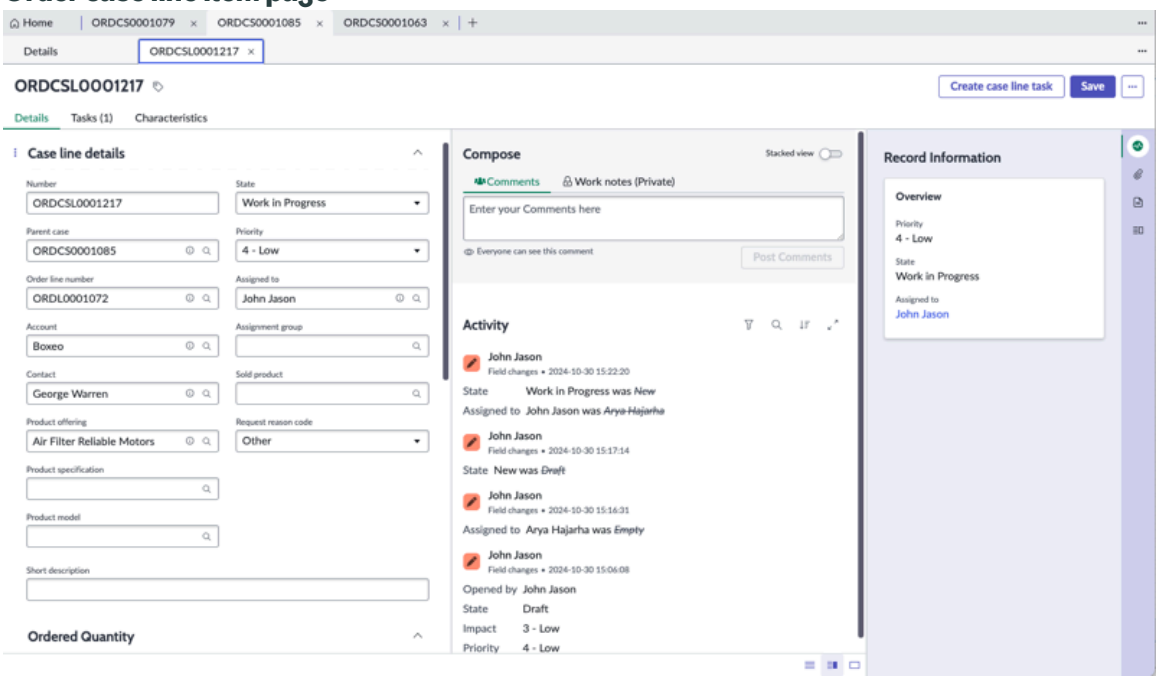
The email templates should be accessed from email dialog.

For more information about composing emails, comments, and work notes, see Modeless dialogs.

Order case line item page

The Order case line item page displays information about an order case line item associated with an order case in CRM Workspace.

Order case line item page



The order case line item record shows the details of an order case line item, including customer and product information, the requested change to the ordered quantity, the shipping location, and estimated dates. This record also includes the following components:

- Details tab: Displays the case line item details, including order and account information, ordered and requested quantities, and shipping information.
- Tasks tab: Displays the tasks created for the case line item.
- Characteristics tab: Displays the specific characteristics of the case line item.
- Contextual side panel: The contextual side panel includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Order case line record page includes the following tabs.

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- Record Information
- Attachments
- Templates

Order case intake page

Customer service agents use the Order case intake page to capture the initial information when creating a new order case.

The agent initiates an order case in one of the following ways:

- Selecting **Create case** from a customer order.
- Selecting **Create case** from the Order Line Items list on a customer order.
- Selecting **Create case** from an interaction record.
- Selecting **New** from the Order Cases list view.

The system displays the Order case intake page after the agent selects an order-related service from the case type selector modal. The agent can enter the following order case details:

- **Account**: the account for the order.
- **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders.
- **Order number**: the order number associated with the order case. This field is mandatory for cases created from the Order Line Items list on a customer order.
- **Short description**: a brief description of the order case.

Depending on where the agent creates the order case from, some of these fields are auto filled. For example, the **Scope of request** displays the following:

- **Specific line items, Single order**: If the agent selects **Create case** from the Order Line Items list on a customer order.
- **Multiple orders**: If the agent selects **Create case** from a customer order.

After saving the intake record, the agent can see the Order case record page with the case line items created either from customer orders or customer order lines.

Order case and order case line item states

Order cases and order case line items move through several different states as agents work to resolve the individual case lines in order cases.

Order case states

Order cases can be in the states listed in the following table. Actions available on the order case record enable agents to move cases from one state to another.

Order case states

State	Description
Draft	The order case is in the Draft state. Select **Submit** on the order case record page to move the order case and all of the order case line items that are currently in the Draft state to New.

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Order case states (continued)

State	Description
New	The order case has been submitted and is in the New state. Select **Assign to me** on the record page to assign the case to the logged-in user and move the order case and all of the order case line items currently in the New state to Work in Progress.
Work in Progress	The assigned agent is working on the order case. Select the following actions: • **Request Information**: use this action to request additional information from the contact or consumer. The state moves to Awaiting Information. • **Resolve Case**: use this action to propose a resolution to the contact or consumer. The state moves from Work in Progress to Resolved.
Awaiting Info	The agent is waiting for the contact to provide the requested information for the order case. Select **Information Received** to move the order case back to Work in Progress.
Resolved	The agent has proposed a resolution for the order case to the contact. Select **Close Case** on the record page to move the order case to Closed.
Closed	The order case has been resolved and the resolution has been accepted by the contact. When all of the case line items for an order case are in a terminal state, the case can be set to Closed. Terminal states include: • Resolved - Accepted • Resolved - Denied • Cancelled
Canceled	The order case has been canceled. Select **Cancel** to cancel an order case. **Note:** You can only cancel order cases in the Draft state.

Order case line item states

Order case line items can be in the states listed in the following table. The case line items in an order case can be in different states as the agent works to resolve each issue.

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Order case line item states

State	Description
Draft	The order case line item is in the Draft state. When an order case is created and is in the Draft state, the associated order case line items are also in the Draft state.
New	The order case line item is in the New state. When an order case is submitted and moved to the New state, the associated order case line items that are currently in Draft state are also moved to the New state.
Work in Progress	The assigned agent is working on the order case line item.
Awaiting Info	The assigned agent has requested additional information about the order case line item and is waiting for a response.
Resolved - Accepted	The change to the order case line item has been accepted.
Resolved - Denied	The change to the order case line item has been denied.
Cancelled	The order case line item has been cancelled.

Syncing the state of an order case with the order case line items

State changes for an order case can result in state changes for the associated order case line items. These changes are detailed in the following table.

Order case and order case line item states

Order case state	Order case line item tate
Draft	Saving a new order case creates the case in the Draft state. Order case line items for the order case are also created in the Draft state.
New	When an agent submits an order case, the state is updated from Draft to New. The states of the associated order case line items that are currently in Draft state are also set to New.
Work in Progress	When an agent selects **Assign to me** on an order case in the New state, the state is updated from New to Work in Progress. The states of the associated order case line items are also set to Work in Progress. If any of the case line items are set to Work in Progress, then the case is also set to Work in Progress.
Resolved	If a case is set to Resolved, the status of each of the case line items is also set to Resolved. If all of the case line items are Resolved, then the case is set to Resolved.
Closed	When all of the case line items for an order case are in a terminal state, the case can be set to Closed. Terminal states include:

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Order case and order case line item states (continued)

Order case state	Order case line item tate
	• Resolved - Accepted • Resolved - Denied • Cancelled When an agent selects **Close Case** on an order case in the Solution Proposed state, the system updates the state to Closed.
Cancelled	When a user selects **Cancel** on an order case in the Draft state, the system updates the state to Cancelled. States for the order case line items associated with the order case are also set to Cancelled. **Note:** You can only cancel order cases in the Draft state.

Creating an order case

Agents can create order cases from a customer order, from an interaction record, or from the Order Cases list view in CRM Workspace.

Agents can create order cases in the following ways:

- Selecting **Create case** from a customer order.
- Selecting **Create case** from the Order Line Items list on a customer order. (This action is enabled if one or more order lines are selected.)
- Selecting **Create case** from an interaction record.
- Selecting **New** from the Order Cases list view.

After initiating an order case, the agent can select an order-related service from the case type selector modal. This modal displays the services that are available for order cases, such as Sales Order Change Request or Sales Order Dispute.

Selecting **Create case** from the case type selector modal displays the Create New Order Case intake form where the agent can enter the following order case details:

- **Account**: the account for the order.
- **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders.
- **Order number**: the order number associated with the order case.
- **Short description**: a brief description of the order case.

Note: Depending on where the agent creates the order case from, some of these fields are auto filled.

Selecting **Save** on the intake form displays the Order case record page. From this record, agents can:

- Add order lines to the order case.
- Delete order lines from the order case.

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- Create new order case line items.
- Edit the details of order case line items.
- Assign order case line items to themselves.

Selecting **Submit** on the Order case record moves the order case and the order case line items currently in the Draft state to the New state. Once in the New state, agents can begin working to resolve the order case. This can include creating tasks for order case line items and assigning them to team members.

Scope of request

An agent can create the following types of order cases:

- Cases that reference one or more order lines from a single customer order.
- Cases that reference multiple complete customer orders.

The Order case record includes the **Scope of request** field. Depending on where the agent initiates the creation of an order case, this field is auto-filled with one of the following values:

- **Specific line items, Single order**: The system creates an order case and converts the selected order lines from the customer order to case line items on that order case.
- **Multiple orders**: The system creates an order case and converts the order header from each customer order to a case line item on that order case.

For example, if an agent creates an order case by selecting **Create case** on a customer order, the scope of request is **Multiple orders**. If an agent selects one or more order lines and then selects **Create case** from the Order Line Items list on a customer order, the scope of request is **Specific line items, Single order**.

Add orders and order line items to an order case

Order cases include a list of order case line items. Depending on how the order case is created, these case line items represent either customer orders or order lines from a single order.

Once an order case has been created, agents can add additional orders or order lines to that case by selecting **Add** on the Order Case Line action bar. Selecting this action displays a modal that shows information based on the values in the **Origin table** field and **Order number** field on the case record.

- If the **Origin table** is set to Customer Order and the **Order number** field is empty, the case type selector modal shows a list of orders associated with the account selected in the **Account** field. The case type selector modal displays "Add orders to case".
- If the **Origin table** is set to Customer Order and the **Order number** field includes an order, the case type selector modal shows a list of order lines associated with that order. The case type selector modal header is "Add order lines to case".

The agent can select a line item from the modal and then select **Add** to add it to the order case as an order case line item.

Create an order case

Create an order case for a customer order or for selected order lines.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

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Procedure

1. In CRM Workspace, create an order case in one of the following ways.
   - Select **Create case** from a customer order.
   - Select **Create case** from the Order Line Items list on a customer order. (This UI action is enabled if one or more order lines are selected.)
   - Select **Create case** from an interaction record.
   - Select **New** from the Order Cases list view.
2. Select an order-related service from the case type selector modal and then select **Create case**. This modal displays the services that are available for order cases, such as Sales Order Change Request or Sales Order Dispute.
3. Fill in the following details on the Create New Order Case intake form.
   - **Account**: the account for the order.
   - **Scope of request**: the agent can create a case for order lines from a single order or for multiple complete orders.
   - **Order number**: the order number associated with the order case.
   - **Short description**: a brief description of the order case.

   Depending on where you create the order case from, some of these fields are auto filled with information from the customer order or interaction records.

   Note: Default values that have been configured for a service definition record can auto populate fields on the order case record. If the **Account**, **Contact**, or **Contract** field values are also defined in the selected service definition record, those values take priority over the values from the customer order record.

4. Select **Save**.
   Saving the Create New Order Case intake form creates the order case record in Draft state.
5. View the order case record details and the order case line items and make any necessary changes.

   You can perform the following tasks while the order case is in Draft state:
   - Add orders or order lines to the order case.
   - Delete orders or order lines from the order case.
   - Create new order case line items.
   - Edit the details of order case line items.
   - Assign order case line items to yourself.
6. Select **Submit**.
   Submitting the order case record moves the order case and the order case line items currently in the Draft state to the New state and enables you to begin working to resolve the order case.

What to do next

After submitting an order case, you can:

- Add or delete orders or order lines to an order case
- Create new order case lines for an order case

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- Edit the information in order case line records
- Create tasks for order case lines and assign them to other users

Add orders or order lines to an order case

Add orders or order lines to an existing order case. You can also delete orders or order lines from an existing order case.

About this task

Adding orders or order lines to an existing case is determined by the value in the **Scope of request** field on the order case record.

- If the value is **Specific line items, Single order**, you can add order lines to the case.
- If the value is **Multiple orders**, you can add orders to the case.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

Procedure

1. Open an order case record in CRM Workspace.
2. Select **Add** in the Order Case Line list.
3. Select the desired orders or order lines in the resulting modal.
   - **Add orders to case**: displays the available orders.
   - **Add order lines to case**: displays the available order lines.
4. Select **Add** in the modal.
   The system adds the selected orders or order lines to the Order Case Line list.

Create an order case line item for an order case

Create a new order case line item for an existing order case.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

Procedure

1. Open an order case record in CRM Workspace.
2. Select **New** in the Order Case Line list.
   This opens a Create New Order Case Line record in a separate sub tab.
3. Fill in the details for the new order case line item.
4. Select **Save**.
   The system adds the new order case line to the Order Case Line list.

Edit an order case line item

Edit one or more order case line items for an order case.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

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Procedure

1. Open an order case record in CRM Workspace.
2. Select an order case line item in the Order Case Line list.
3. Select **Edit** to display the Edit item panel.
4. Edit the desired fields.

   Note: For cases created for multiple complete orders, agents can only make changes to the order header, such as changes to shipping dates and locations.

5. Select **Update** at the bottom of the Edit item panel.

Create a task for an order case line item

Create a task for an order case line item.

Before you begin

Role required: sn_order_case.creator, sn_order_case.agent, sn_customerservice_agent, admin

Procedure

1. Open an order case record in CRM Workspace.
2. Select an order case line item in the Order Case Line list.
3. Select **Create task** to display the Create New Case Line Task form.
4. Enter information in the fields on the form.
5. Select **Save**.
   The system displays the new case line task record.

Order case form

The order case form displays details about an order case.

Order case form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Order Case table is ORDCS.
Account	The name of the company that the order case is opened for.
Contact	The name of the customer contact for the order case.
Scope of request	Identifies the scope of the change for an order case Agents can use this field to select the type of change for an order case. • **Specific line items, Single order**: Sets one or more order line items as the source for case line items. • **Multiple orders**: Sets one or more complete orders as the source for case line items. Selecting **Specific line items, Single order** sets the **Origin table** field to "Order Line Item" and makes the **Order number** field mandatory.

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Order case form fields (continued)

Field	Description
	When the user selects the order number in the **Order number** field and selects **Add** on the Order Case form, the system displays the Add order lines to case modal. This modal lists the order lines for the specified order number. Selecting **Multiple orders** sets the **Origin table** field to "Customer Order".
Order number	Reference to the customer order. If the **Scope of request** field is set to "Specific Line Items, Single Order" then this field becomes mandatory.
Channel	The method by which the customer initiated contact and the case was opened. • Web (default) • Phone • Email • Chat • Social
Service	The service that was selected from the service selector when the order case was created.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.
Asset	The asset tag number or the serial number of the asset involved in this case.
Install Base	The Install base field helps you track which products and services have been purchased by a customer, how they have been installed or provisioned, along with the detailed configuration for each installed item.
Origin table	Displays the table where the order case was initiated.
Short description	A brief description of the issue or request.
Needs attention	When checked, the system sends a notification to the agent in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Opened	The date and time that the case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High

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Order case form fields (continued)

Field	Description
	• 3 — Moderate • 4 — Low (default)
Assignment group	The assigned customer service agent group.
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Contract	The contract number associated with the order case.
Entitlement	The entitlement associated with this case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the **Account**, **Contract**, **Product**, and **Asset** fields. If only one entitlement is available for this case, it is automatically added to the **Entitlement** field.
Partner contact	The name of the partner contact.
Partner	The name of the partner company.
Parent	The parent record for the order case.
Resolution code	Choice list indicating the resolution states for the case. This field is mandatory when an agent proposes a solution for a case. The Order Operations Case Management application adds the following resolution codes to the **Resolution code** field: • Change approved • Added replacement product
Request reason code	• Increase Demand • Change in Contract • Initial input incorrect • Other

Order case line item form

The order case line item form displays details about an order case line on a case record.

Order case line item form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Order Case Line table is ORDCSL.
Parent case	Displays the related order line.

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Order case line item form fields (continued)

Field	Description
Order line number	The parent case for the order line item record.
Account	The name of the company that the order case is opened for.
Contact	The name of the customer contact for the order case.
Product offering	The product offering for the order case line item.
Product specification	The product specification for the order case line item.
Product model	
Short description	A brief description of the order case line item record.
State	The state of the order case line item record: • Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted • Resolved - Denied • Cancelled
Priority	The priority of the order case line item record: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Assignment group	The assigned customer service agent group.
Sold product	A product, component, or service that has been sold to an account or a consumer.
Request reason code	The reason that the customer is requesting a change to the order case line item. • Increase Demand • Change in Contract • Initial input incorrect • Other
Ordered quantity	Stores the original ordered quantity.
Requested quantity	Stores the quantity change requested.

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Order case line item form fields (continued)

Field	Description
Approved quantity	Stores the quantity change approved by the agent.
Expected start date	
Requested expected date	
Approved expected date	
Current shipping location	Stores the original shipping location.
Requested shipping location	Stores the requested change in shipping location.
Resolution code	Choice list indicating the resolution states for the case.
Close notes	Details about how the case was closed.
Additional comments	Customer-viewable comments added to the activity stream.
Work notes	Comments and information added to the activity stream that are available only to internal users.

Components installed with Order Operations Case Management

Several types of components are installed with the Order Operations Case Management application, including tables, roles, and service definitions.

Tables

The Order Operations Case Management application adds the following tables.

Order Operations Case Management tables

Table	Description
Order Case [sn_order_case]	Stores order case records. This table extends the Case [sn_customerservice_case] table. Records in the Order Case table use the prefix **ORDCS**.
Order Case Line [sn_order_case_line]	Stores the case line items created for order cases. This table extends the Case Line [sn_case_line] table. Requesters and fulfillers can use this table to capture the orders and order lines as line items on an order case for which they want to request order changes, resolve disputes, or make inquiries. Records in the Order Case Line table use the prefix **ORDCSL**.

The Order Operations Case Management application also uses the following tables from the Case lines and workflows application.

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Case lines and workflows tables

Table	Description
Case Line [sn_case_line]	The Case Line table stores case line item records. This table extends the Task table. The prefix for case line records is **CSL**.
Case Line Characteristic [sn_case_line_characteristic]	The Case Line Characteristic form displays details about a case line item on a case record. The prefix for case line characteristic records is **CSLC**.
Case Line Task [sn_case_line_task]	The Case Line Task table stores the tasks related to case line items. This table extends the Case Task table. The prefix for case line task records is **CSLTASK**.

Roles

The Order Operations Case Management application includes roles that provide access to order cases and order case line items. It also updates some existing roles to provide this same access.

Order Operations Case Management roles

Role	Description	Includes roles
Order case agent [sn_order_case.agent]	Provides create, read, and update access to: • Order cases • Order case line items • Case line characteristics • Order case tasks • Order case line tasks Provides read access to: • Orders • Order line items • Order line characteristics	• sn_customerservice_agent • sn_order_case.creator • sn_order_case.writer • sn_order.navigation_menu • sn_order_case.delete
Order case agent manager [sn_order_case.agent_manager]	Provides create, read, and update access to: • Order cases • Order case line items • Case line characteristics	• sn_customerservice_manager • sn_order_case.agent • sn_order_case.report_viewer

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Order Operations Case Management roles (continued)

Role	Description	Includes roles
	• Order case tasks • Order case line tasks This role can also override agent actions.	
Order case viewer [sn_order_case.viewer]	Provides read access to the following records: • Order cases • Order case line item s • Case line characteristics	sn_case_line.characteristic_viewer
Order case creator [sn_order_case.creator]	Provides create access to the following records: • Order cases • Order case line items • Case line characteristics	• sn_order_case.viewer • sn_case_line.characteristic_creator
Order case writer [sn_order_case.writer]	Provides write access to the following records: • Order cases • Order case line items • Case line characteristics	• sn_order_case.viewer • sn_case_line.characteristic_writer
sn_order_case.delete	Provides delete access to order cases and case line items. **Note:** Once a case has been submitted, only users with the admin role can delete an order case or case line items.	• sn_order_case.viewer • sn_case_line.characteristic_delete
Order case report viewer [sn_order_case.report_viewer]	Report viewer role for the Order Case and Order Case Line tables. This role can view reports for order cases.	
sn_order_case.navigation_menu	Provides access to Order case navigation menus.	
sn_caseline_characteristic.viewer	Provides read access to case line characteristic records if the user has access to the case line items.	

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Order Operations Case Management roles (continued)

Role	Description	Includes roles
sn_caseline_characteristic.creator	Provides create access to case line characteristic records if the user has access to the case line items.	sn_caseline_characteristic.viewer
sn_caseline_characteristic.writer	Provides update access to case line characteristic records if the user has access to the case line items.	sn_caseline_characteristic.viewer
sn_caseline_characteristic.delete	Provides delete access to case line characteristic records if the user has access to the case line items.	sn_caseline_characteristic.viewer
sn_caseline_characteristic.reporter	Reporter viewer role for the Case Line Characteristic table.	
Case task agent [sn_customerservice.case_task_agent]	This role provides access to case tasks and related case information. For the Order Operations Case Management application, when a case line task is assigned to a case task agent, that agent has read access to the following records: • Order case • Order case line item • Case line characteristic When a case line task is assigned to a case task agent, the agent's name and assignment group are added to the **Contributor Users** and **Contributor Groups** fields on the Order case record. If the **Assigned to** field on the case line task record changes, these fields are updated.	• sn_customerservice.customer_data_viewer • sn_customerservice.csm_workspace_user • sn_customerservice.case_contributor_editor

Service definitions and service definition categories

The Order Operations Case Management application provides the following order case service definitions. These service definitions belong to the Orders service definition category, which stores services for order-related issues. When creating a case, agents can select the desired service definition in the case type selector.

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Note: The system administrator needs to activate these service definitions. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions** and filter the list to show service definitions from the Order Case [sn_order_case] table.

For more information about service definitions and categories, see the following topics:

- Service definitions
- Service definition categories

Order case service definitions

Service definition	Description
Sales Order Change Request	Request a change to sales order lines on a single order or multiple sales orders. • Type: Post Sales • Table: Order Case [sn_order_case] • Products: All • Service definition category: Orders
Sales Order Dispute	Dispute an entire order or specific order lines on an order. • Type: Post Sales • Table: Order Case [sn_order_case] • Products: All • Service Definition Category: Orders

Special handling notes configuration

The Order Operations Case Management application includes a configuration for special handling notes on the Order Case table [sn_order_case]. To view this record, navigate to **Special Handling Notes** > **Configuration**.

The configuration for the Order Case table includes the following related fields:

- Account
- Contact
- Product Model
- Sold Product
- Install Base
- Assigned to

This configuration includes a condition that creates special handling notes for order cases that have a priority of P1 - Critical. It also includes the following information:

- **Short description**: Urgent issue reported.
- **Message**: This case is set as critical. Follow up immediately.

For more information, see Special handling notes.

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Order case archive rules

The Order Operations Case Management application includes archive rules that archive older order cases.

Order Operations Case Management archive rules

Archive rule	Description
Archive Order Case	This rule archives order case records that have been closed for more than 2 years. Archiving these order case records also archives the following records: • Order case tasks • Order case lines • Case line characteristics • Order case line tasks
Archive Order Case Line	This rule archives order case line records that have been closed for more than 2 years. Archiving these order case records also archives the following records: • Case line characteristics • Order case line tasks

Order case records that have been archived for more than 5 years are deleted. Deleting these records also deletes the following records:

- Order case tasks
- Order case line items
- Case line characteristics
- Order case line tasks

Order case workflows

The Order Operations Case Management application includes subflows that provide the mapping between a customer order and an order case. These subflows are used when an agent creates an order case from a customer order.

These subflows create the data mapping between two different entities: 1) the customer order and 2) the order case. For example, when mapping a customer order to order case line items, the entities share some fields such as **Account**, **Contact**, and **Contract**. The data mapping copies these field values from the customer order to the order case line items on the order case.

- If an order case is created by selecting **Create case** from a customer order:
  - The **Scope of request** is set to **Multiple orders**.
  - The mapping copies the data from the selected order headers to create order case line items.
- If an order case is created by selecting **Create case** from the Order Line Items list on a customer order.

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- The **Scope of request** is set to **Specific line items, Single order**.
- The mapping copies the data from selected order lines to create case line items as well as copies the order line characteristics to case line item characteristics.

Subflows:

- **Primitives - Order to order case for multiple request**
  - Inputs: Order IDs, Order Case ID
  - Action: Create Case Line Item - Multiple Request

    Creates an order case line item on the order case based on the customer order.
- **Primitives - Order to order case for single request**
  - Inputs: Order ID, Order Case ID, Selected IDs
  - Action: Create Case Line Item - Single Request

    Creates order case line items based on the selected order line items from the customer order.

To view these subflows, navigate to **All** > **Process Automation** > **Workflow Studio** and select **Subflows** on the Workflow Studio homepage.

Case Lines and Workflows

The Case lines and workflows application provides the ability to reference multiple line items on a case record. Agents and customers with the `sn_customerservice.customer` role can use these line items to capture, track, and resolve multiple related issues in a single case.

The Case lines and workflows application provides the framework for a case type to handle multiple related issues. One example is the Orders case type available with the Order Operations Case Management application. This case type enables users to create cases with case line items for multiple orders or for multiple order lines within a single order.

Case line items enable users to track multiple issues for the same case. Users can resolve these different issues, represented by case line items, independently before resolving and closing the case. Users can take different actions on different case line items depending on the need.

This application supports different types of line items based on the source of the case. These line items can include entities such as orders or order lines, invoices or invoices lines, contracts, and sold products. Each case line item maps to an entity line (for example, an order line) and has its own resolution process.

Benefits of using case line items

Using the Case lines and workflows application provides the following benefits:

- Identify when an order cannot be filled completely and recommend alternative items.
- Process inflight order changes and customer-initiated changes, such as changes to items, quantities, or requested ship dates.
- Process order exceptions and manage the approval and fulfillment process.
- Manage suppliers by creating supplier cases for order-related questions, such as increasing or decreasing quantity, quality issues, or status tracking.

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Case lines and workflows plugin

The Case lines and workflows application (com.sn_case_line) enables the Case table to store multiple line items on a case record. These line items are product instances and can be extended for various entities such as orders, order lines, invoices, invoice lines, and contracts.

The case lines and workflows application includes a Case Line Items list view in the Core UI. To access the Case Line Items list, navigate to **All** > **Customer Service** > **Cases** > **All Line Items**.

The Case lines and workflows application also includes tables and roles. For more information, see Components installed with Case lines and workflows.

The Case lines and workflows application is available from the ServiceNow Store.

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.

Related topics

- Order case pages
- Case line item form
- Case line task form
- Case line characteristic form
- Case line entitlement form

Case line record pages

The Case lines and workflows application includes record pages that display case line items, case line characteristics, and case line tasks in CRM Workspace.

The following record pages use the CSM default record page to display case line, case line task, and case line characteristic information in CRM Workspace.

Case line record pages

Case line item page	The case line item page shows the details of a case line item, including customer and product information, the requested change to the ordered quantity, the shipping location, and estimated dates.
Case line task page	The case line task page displays information about a task created for a case line item.
Case line characteristic page	The case line characteristic record page displays details about the product offering included in a case line item.
Case line entitlement page	The case line entitlement page displays details about an entitlement associated with a case line item.

Case line item page

The case line item page displays information about a case line item associated with a case.

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The case line item page shows the details of a case line item, including customer and product information, the requested change to the ordered quantity, the shipping location, and estimated dates.

Case line item page tabs

The case line item page includes the following tabs:

- Details: Displays the case line item details, including order and account information, ordered and requested quantities, and shipping information.
- Case Line Characteristics: Displays the specific characteristics of the case line item.
- Case Line Tasks: Displays the tasks created for the case line item.
- Case Line Entitlements: Displays the entitlements associated with the case line item. The visibility of the Entitlements tab is controlled by the sn_customerservice.advanced_entitlements system property.

  The Entitlements tab displays the entitlements associated with the case line item. From this tab, users can associate one or more entitlements to a case line item. The system displays the available entitlements for a case line item based on the customer's service contracts and accounts.

Contextual side panel

The contextual side panel on the case line item page includes different tools that agents can use to research and resolve customer issues. The contextual side panel on the case line item page includes the following tabs.

- Record Information
- Attachments
- Templates

Case line item page UI actions

The case line page includes the following actions.

Case line page actions

Action	Description
Create case line task	Appears in the case line item action bar. To create a case line task: **1.** Select **Create case line task** to display a Create New Case Line Task record in a separate tab. **2.** Enter information in this record and select **Save** to create the case line task record. Case line tasks are added to the Tasks tab on the case line record.
Save	Appears in the case line item action bar. Selecting this action saves changes to the case line item record.
Delete	Appears in the More actions menu. Selecting this action displays a confirmation pop-up window. Select **OK** to complete the delete action.

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Case line page actions (continued)

Action	Description
	• Agent role: can delete case line item records in Draft state. • Admin role: can delete case line item records in any state.

Case line task page

The case line task page displays information about a task created for a case line item.

Agents can use the case line task page to view information about a case line task and to assign the task to other users.

Case line task page tabs

The case line task page includes the following tabs:

- Details: Displays the case line task details, including the parent case and case line item, account and contact, and assigned group and user.
- SLAs: Displays the SLAs for the case line task.
- Time Worked: Displays time worked on the case line task.

Contextual side panel

The contextual side panel on the case line page includes different tools that agents can use to research and resolve customer issues. The contextual side panel on the case line task page includes the following tabs.

- Record Information
- Attachments
- Templates

Activity stream

The activity stream on the case line task page displays a list of activities occurring on the case line task record.

The activity stream can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities.

Agents can use the activity stream to post work notes and comments about the case line task and to view a list of the task activities.

Case line item states

A case line item can be in one of several different states as agents work to resolve a case and the associated case line items. The case line items in a case can be in different states as the agent works to resolve each issue.

Case line item states

State	Description
Draft	The case line item is in the Draft state.

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Case line item states (continued)

State	Description
	When a case is created and is in the Draft state, the associated case line items are also created in the Draft state.
New	The case line item is in the New state. When a case is submitted and moved to the New state, the associated case line items that are currently in the Draft state are also moved to the New state.
Work in Progress	The assigned agent is working on the case line item.
Awaiting Info	The assigned agent has requested additional information about the case line item and is waiting for a response.
Resolved - Accepted	The change to the case line item has been accepted.
Resolved - Denied	The change to the case line item has been denied.
Cancelled	The case line item has been cancelled.

Syncing the state of a case with the case line items

The Case lines and workflows application syncs the state of the case line items with the parent case.

Case and case line item states

State	Description
Draft	When a case is created for an item with multiple lines, such as an order, new case line items are also created. The case and case line items are created in the Draft state.
New	When a case is submitted, the state is updated from Draft to New. The states of the associated case line items that are currently in the Draft state are also set to New.
Work in Progress	When an agent selects **Assign to me** on a case in the New state, the state is updated from New to Work in Progress. The states of the associated order case line items that are currently in the New state are also set to Work in Progress. If any of the associated case line items are set to Work in Progress, the case is set to Work in Progress.
Resolved	When a case is set to Resolved, the status of each associated case line item is also set to Resolved. If all of the case line items are Resolved, the case is set to Resolved.
Closed	If all of the case line items are in a terminal state, the case can be set to Closed. Terminal states include:

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Case and case line item states (continued)

State	Description
	• Resolved - Accepted • Resolved - Denied • Cancelled
Cancelled	When a case in the Draft state is set to Cancelled, the status of each associated case line item is also set to Cancelled. **Note:** Agents can only cancel cases in the Draft state.

Creating case line items and case line tasks

Agents can create case line items for cases and create tasks for case line items.

Creating case lines

To create a case line record:

- CRM Workspace: Open a case and select **New** on the Case Line list action bar to open a new case line record in the Draft state.
- Core UI: Open a case and select **New** on the Case Lines related list on the case record to open a new case line record in the Draft state.

The information in the following fields is copied from the parent case:

- Account
- Contact
- Parent case
- Priority
- Assignment group
- Assigned to

If a bundled product is added to a case line item record, the system creates a case line item for each component in the bundle after the agent saves the new case line item record. The case line characteristics are also created for each component.

Create a case line task

The case line item record includes a **Create case line task** action that agents can use to create tasks for a case line item.

1. Open a case line item record.
2. Select **Create case line task** to open a Create new case line task form.

   Some fields on this form are auto populated with details from the Case line record.

3. Enter additional information as needed.
4. Select **Save** to create the case line task record.

   Case line tasks appear in the Tasks tab on the case line item record.

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Case Line list action bar

In CRM Workspace, the Case Line list action bar appears at the top of the Case Line list component on a case record.

Agents can add case lines from existing entities, such as orders or invoices, or create new case lines.

- **New**: Opens a Create New Case Line record in a separate tab. Fill in the fields and select **Save** to add the case line to the list.
- **Add**: Displays the Add lines to case modal. Select one or more lines and then select **Add** to add the selected case lines to the list.

After selecting a case line, users can edit the case line details, assign a case line to themselves, or delete a case line.

- **Edit**: Displays the details for the selected case line in a panel. Make the necessary changes and select **Update** at the bottom of the panel.
- **Assign to me**: Assigns the selected case line to the current user.
- **Delete**: Deletes the selected case line. Select **Delete all** in the confirmation pop-up window.

Case Management for Invoice Operations

The Case Management for Invoice Operations application enables customer service agents to create cases for specific lines from a single invoice or for multiple invoices.

The Case Management for Invoice Operations application includes the Invoice case type. This case type provides the ability to reference multiple invoices or invoice lines as case lines on an invoice case record. By using case lines, agents can track multiple issues for the same invoice case and resolve the issues in each case line independently before resolving and closing the invoice case.

Use invoice cases to handle issues such as invoice disputes or requested corrections. With this application, agents can create an invoice case and add the invoices or invoice lines that are being disputed or that must be corrected. Agents can work through the case, create case tasks for other team members as needed, or assign case lines to other agents.

Benefits of using invoice cases

Businesses can encounter invoice issues for many reasons including price or quantity discrepancies or incorrect products or services. Invoice issues can also result from incorrect customer details such as incorrect billing or shipping locations. The following table provides some examples of these issues and the resulting invoice cases.

Invoice case examples

Reason	Case example
Price adjustments	The quantity of items invoiced does not match what was ordered or delivered, leading to either underbilling or overbilling.
Price discrepancies	The amount billed does not match the agreed-upon price or contract terms, such as incorrect discounts, tax calculations, or unit prices.
Incorrect customer information	The invoice contains errors in the customer's name, address, or billing information, which can affect payment processing.

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Invoice case examples (continued)

Reason	Case example
Missing or incorrect items	An invoice includes products or services that were not delivered, or omits items that were delivered but not invoiced.
Part number or SKU errors	The part numbers or SKUs listed on the invoice do not match the products that were ordered or delivered, causing confusion or errors in inventory and payment processing.
Currency issues	An invoice is issued in the wrong currency or without proper conversion rates, creating discrepancies in the payment amount.
Incorrect unit of measure (UOM)	The unit of measure (for example, quantity per box, per meter, per kilogram) on the invoice is incorrect, causing confusion or errors in pricing and quantity calculations.
Dispute on negotiated price, discounts, or promotions	The invoice reflects a different price than what was negotiated, or discounts and promotions are not applied, leading to a dispute over the final amount due.
Incorrect invoice number	The invoice number does not follow the correct sequence, leading to accounting or tracking problems.

Overview of creating an invoice case

The following table provides an overview of the process for creating an invoice case. For detailed steps, see Create an invoice case.

Steps for creating an invoice case

Step	Description
Creating an invoice case	An agent can create an invoice case from CRM Workspace or from the Core UI by selecting **New** from the Invoice Cases list view.
Viewing the invoice case record	After creating an invoice case record, agents can: • Add invoices or invoice lines to the case. • Delete invoices or invoice lines from the case. • Create new invoice case lines. • Edit the details of invoice case lines. • Assign invoice case lines to themselves. • Create tasks for invoice case lines.
Submitting the invoice case record	Selecting **Save** on the Invoice case record moves the invoice case to the Draft state. After reviewing the record details, the agent can select **Submit** on the Invoice case record to move the invoice case and the invoice case lines to the New state. Once in the New

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Steps for creating an invoice case (continued)

Step	Description
	state, agents can begin working to resolve the invoice case. This includes creating tasks for invoice case lines, assigning them to other agents or team members, and monitoring case progress.

Case Management for Invoice Operations plugin

Case Management for Invoice Operations (com.sn_csm_invoice) is a case management application for handling support requests on invoices or invoice lines. This application enables customers to process invoice service requests such as invoice disputes or invoice inquiries.

Note: The Case Management for Invoice Operations application has a dependency on the Case lines and workflows application (com.sn_case_line).

The Case Management for Invoice Operations application includes list views for CRM Workspace and Core UI.

- In CRM Workspace, expand the **Invoice Cases** list category in the Lists tab.
- In Core UI, navigate to **All** > **Invoice Case**.

The Case Management for Invoice Operations application also includes tables, roles, service definitions, the Invoice case type, and other components. For more information, see Components installed with Case Management for Invoice Operations.

The Case Management for Invoice Operations application is available from the ServiceNow Store.

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.

Invoice case pages

The Case Management for Invoice Operations application includes record pages that display invoice cases and invoice case lines in CRM Workspace.

The Case Management for Invoice Operations application enables agents to create invoice cases that reference customer invoices and invoice lines. Using invoice cases, agents can manage and track customer requests and the actions taken to fulfill these requests.

Invoice cases contain invoice case lines, which represent either invoice lines from a single invoice or multiple invoices. The Case Management for Invoice Operations application includes the following record pages to display this information in CRM Workspace.

Invoice case record page

The Invoice case record page displays information about invoice cases and the associated list of invoice case lines.

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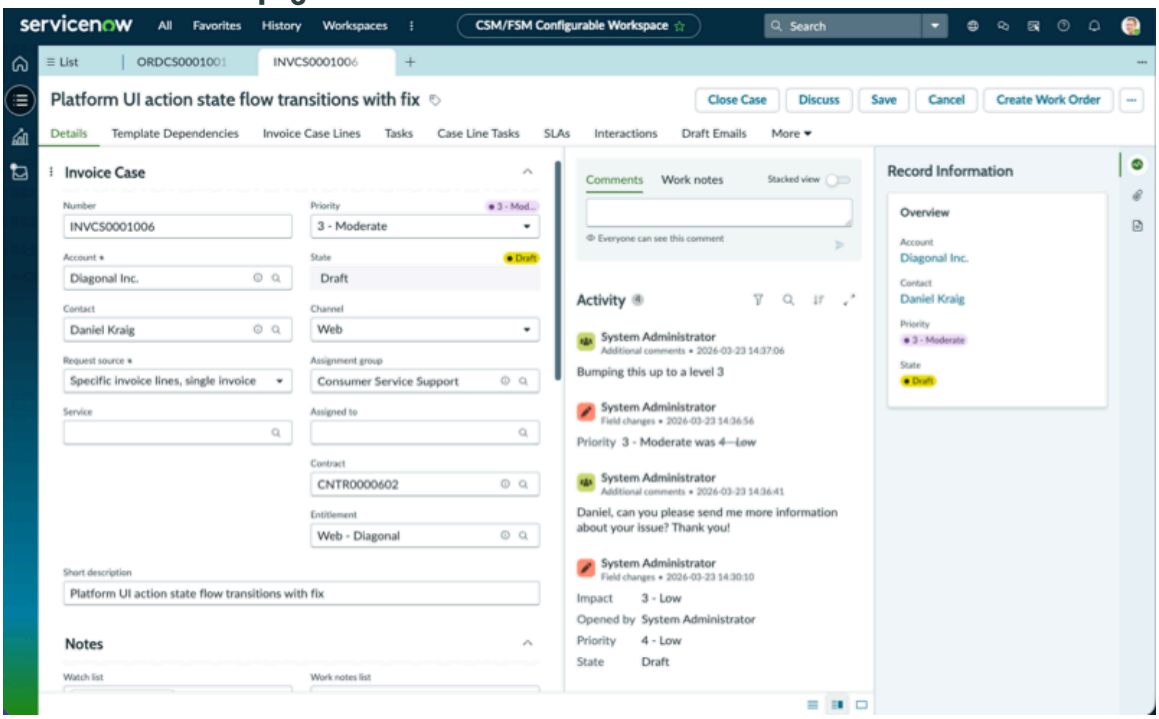
Invoice case record page



Customer service agents use this page to do the following:

- Add invoices or invoice lines to the invoice case.
- Delete invoices or invoice lines from the invoice case.
- Create new invoice case lines.
- Edit the details of invoice case lines.
- Assign invoice case lines to themselves.

The Case Management for Invoice Operations application uses the CSM default record page to display Invoice case records in CRM Workspace.

Invoice case line record page

The Invoice case line record page displays information about an invoice case line associated with an invoice case.

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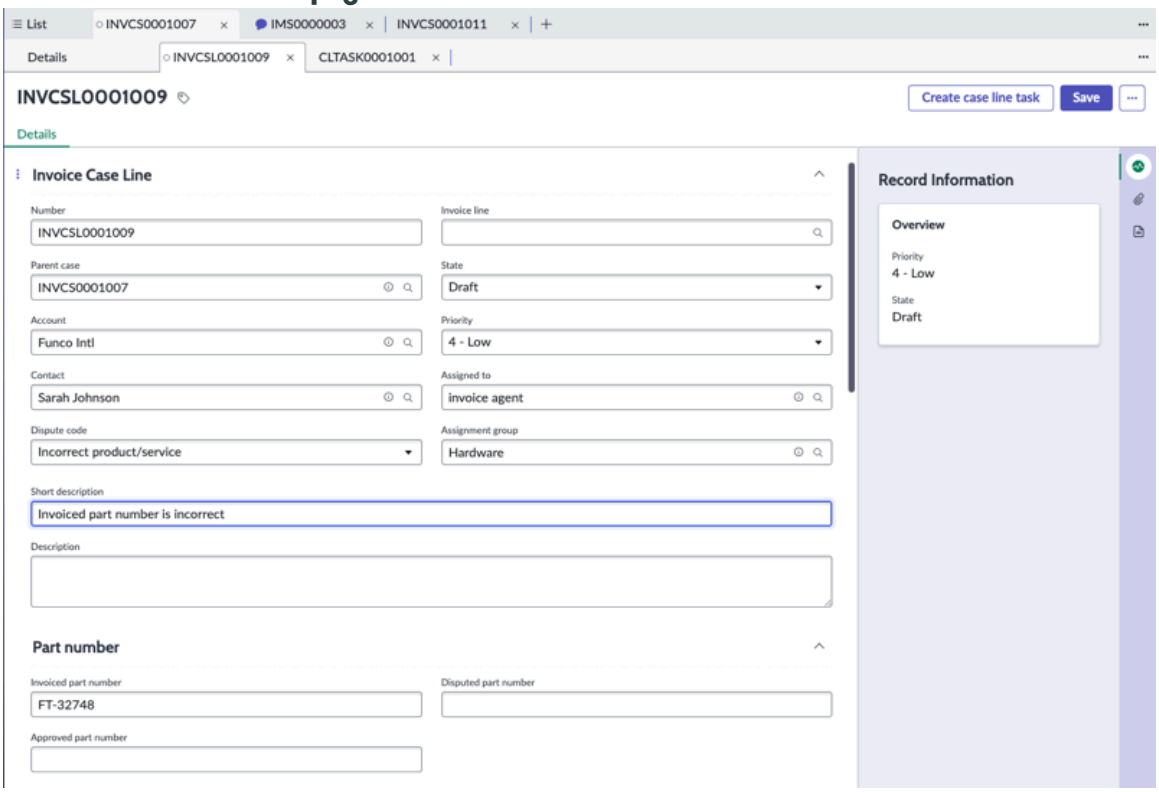
Invoice case line record page



The Invoice case line record shows the details of an invoice case line, including customer and product information, the invoiced quantity, invoice discounts, and the billing and shipping locations. From this page, agents can select **Create case line task** to create tasks for invoice case lines.

Invoice case and invoice case line states

Invoice cases and invoice case lines move through several different states as agents work to resolve the individual case lines in invoice cases.

Invoice case states

Invoice cases can be in the states listed in the following table. Actions available on the invoice case record enable agents to move cases from one state to another.

Invoice case states

State	Description
Draft	The invoice case is in the Draft state. Select **Submit Case** on the invoice case record page to move the invoice case and all of the invoice case lines that are currently in the Draft state to New.
New	The invoice case has been submitted and is in the New state. Select **Assign to me** on the record page to assign the case to the logged-in user and move the invoice case and all of the invoice case lines currently in the New state to Work in Progress.

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Invoice case states (continued)

State	Description
Work in Progress	The assigned agent is working on the invoice case. Select the following actions: • **Request Information**: Use this action to request additional information from the contact or consumer. The state moves to Awaiting Information. • **Propose solution**: Use this action to propose a resolution to the contact or consumer. The state moves from Work in Progress to Resolved.
Awaiting Info	The agent is waiting for the contact to provide the requested information for the invoice case. Select **Information Received** to move the invoice case back to Work in Progress.
Resolved	The agent has proposed a resolution for the invoice case to the contact. Select **Close Case** on the record page to move the invoice case to Closed.
Closed	The invoice case has been resolved and the resolution has been accepted by the contact. When all of the case lines for an invoice case are in a Final state, the case can be set to Closed. Final states include: • Resolved - Accepted • Resolved - Denied • Canceled
Canceled	The invoice case has been canceled. Select **Cancel** to cancel an invoice case. **Note:** You can only cancel invoice cases in the Draft state.

Invoice case line states

Invoice case lines can be in the states listed in the following table. The case lines in an invoice case can be in different states as the agent works to resolve each issue.

Invoice case line states

State	Description
Draft	The invoice case line is in the Draft state. When an invoice case is created and is in the Draft state, the associated invoice case lines are also in the Draft state.

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Invoice case line states (continued)

State	Description
New	The invoice case line is in the New state. When an invoice case is submitted and moved to the New state, the associated invoice case lines that are currently in Draft state are also moved to the New state.
Work in Progress	The assigned agent is working on the invoice case line.
Awaiting Info	The assigned agent has requested additional information about the invoice case line and is waiting for a response.
Resolved - Accepted	The change to the invoice case line has been accepted.
Resolved - Denied	The change to the invoice case line has been denied.
Canceled	The invoice case line has been canceled.

Note: An agent can manually change the state of each invoice case line to Resolved - Accepted, Resolved - Denied, or Canceled. When all of the invoice case lines are in one of these states, the state of the invoice case changes to Resolved.

Syncing the state of an invoice case with the invoice case lines

State changes for an invoice case can result in state changes for the associated invoice case lines. These changes are detailed in the following table.

Invoice case and invoice case line states

Invoice case state	Invoice case line state
Draft	Saving a new invoice case creates the case in the Draft state. Invoice case lines for the invoice case are also created in the Draft state.
New	When an agent submits an invoice case, the state is updated from Draft to New. The states of the associated invoice case lines that are currently in Draft state are also set to New.
Work in Progress	When an agent selects **Assign to me** on an invoice case in the New state, the state is updated from New to Work in Progress. The states of the associated invoice case lines are also set to Work in Progress. If any of the case lines are set to Work in Progress, then the case is also set to Work in Progress.
Resolved	If a case is set to Resolved, the status of each of the case lines is also set to Resolved. If all of the case lines are Resolved, then the case is set to Resolved.
Closed	When all of the case lines for an invoice case are in a final state, the case can be set to Closed. Final states include:

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Invoice case and invoice case line states (continued)

Invoice case state	Invoice case line state
	• Resolved - Accepted • Resolved - Denied • Canceled When an agent selects **Close Case** on an invoice case in the Solution Proposed state, the system updates the state to Closed.
Canceled	When a user selects **Cancel** on an invoice case in the Draft state, the system updates the state to canceled. States for the invoice case lines associated with the invoice case are also set to canceled. **Note:** You can only cancel invoice cases in the Draft state.

Components installed with Case Management for Invoice Operations

Several types of components are installed with the Case Management for Invoice Operations application, including tables, roles, and service definitions.

Tables

The Case Management for Invoice Operations application adds the following tables.

Case Management for Invoice Operations tables

Table	Description
Invoice Case [sn_csm_invoice_case]	Stores invoice case records. This table extends the Case [sn_customerservice_case] table. Records in the Invoice Case table use the prefix **INVCS**.
Invoice Case Line [sn_csm_invoice_case_line]	Stores the case line items created for invoice cases. This table extends the Case Line [sn_case_line] table. Requesters and fulfillers can use this table to capture the invoices and invoice lines as line items on an invoice case for which they want to resolve disputes, or make inquiries. Records in the Order Case Line table use the prefix **INVCSL**.

The Case Management for Invoice Operations application also uses the following tables from the Case lines and workflows application.

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Case lines and workflows tables

Table	Description
Case Line [sn_case_line]	The Case Line table stores case line item records. This table extends the Task table. The prefix for case line records is **CSL**.
Case Line Characteristic [sn_case_line_characteristic]	The Case Line Characteristic form displays details about a case line item on a case record. The prefix for case line characteristic records is **CSLC**.
Case Line Task [sn_case_line_task]	The Case Line Task table stores the tasks related to case line items. This table extends the Case Task table. The prefix for case line task records is **CSLTASK**.

Roles

The Case Management for Invoice Operations application includes roles that provide access to invoice cases and invoice case line items. It also updates some existing roles to provide this same access.

Invoice Operations roles

Role	Description	Includes roles
Invoice case agent [sn_csm_invoice.agent]	The invoice case agent should have CRUD access to the invoice case header, invoice case line items, read-only access to invoices and invoice lines, products and product characteristics, accounts and contacts and assignment of invoice cases	• sn_customerservice_agent • sn_case_line.characteristic_delete • sn_csm_invoice.creator • sn_csm_invoice.writer • sn_otc.ar_invoice_viewer • sn_csm_invoice.navigation_menu
Invoice case manager [sn_csm_invoice.manager]	The invoice case manager should have all the access that invoice case agent has + manages agents + manager reports	• sn_csm_invoice.agent • sn_csm_invoice.report_viewer • sn_customerservice_manager • sn_case_line.characteristic_report_viewer
Invoice case task agent [sn_csm_invoice.invoice_case_task_agent]	The invoice case task should have all the access to the case tasks assigned to the agent as well as read-only access to view the invoice case/invoice case lines,	• sn_otc.ar_invoice_viewer • sn_customerservice.case_task_agent

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Invoice Operations roles (continued)

Role	Description	Includes roles
	invoices/invoice lines that case task is associated with and also be able to update worknotes and comments	

In addition to the persona roles, granular roles on invoice case header and invoice case lines are also needed.

Invoice Operations granular roles

Role	Description	Includes roles
Invoice case viewer [sn_csm_invoice.viewer]	Read only access to invoice case, invoice case lines if access to invoice case, invoice case line characteristics if access to case line. Read access to invoice cases.	sn_case_line.characteristic_viewer
Invoice case creator [sn_csm_invoice.creator]	Creating an invoice case with invoice case lines and invoice case line characteristics. Create access to invoice cases.	• sn_case_line.characteristic_creator • sn_csm_invoice.viewer
Invoice case writer [sn_csm_invoice.writer]	Editing an invoice case with invoice case lines if access to invoice case and invoice case line characteristics if access to case line. Write access to invoice cases.	• sn_case_line.characteristic_writer • sn_csm_invoice.viewer
Invoice case navigation menu [sn_csm_invoice.navigation_menu]	Access the invoice case navigation menu item. Role to access the invoice case navigation menus.	
Invoice case report viewer [sn_csm_invoice.report_viewer]	Access to invoice case reports. Report viewer access to invoice cases.	

Service definitions and service definition categories

The Case Management for Invoice Operations application provides the following invoice case service definition: **Invoice Disputes**.

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- Type: Post-Sale
- Table: Invoice Case [sn_csm_invoice_case]
- Products: All
- Service definition category: Invoice

Agents can use this service definition to raise a dispute for one or more invoices or for specific lines on a single invoice.

This service definition belongs to the Invoice service definition category, which stores services for invoice-related issues. When creating an invoice case, agents can select this service definition in the case type selector.

Note: The **Invoice Disputes** service definition is not active by default. To activate this service definition, the system administrator can:

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Filter the list to show service definitions from the Invoice Case [sn_invoice_case] table.
3. Select **Invoice Disputes**.
4. Enable the **Active** check box.

For more information about service definitions and categories, see the following topics:

- Service definitions
- Service definition categories

Service level agreements (SLAs)

The Case Management for Invoice Operations application includes the following SLAs for the Invoice Case table (sn_csm_invoice_case).

SLA	Description
Initial Response Time for P1 and P2 cases	• Start condition: State of the case is New and Priority is P1 or P2. • Stop condition: State is not New or Draft. • Schedule: None (24x7). • Duration: 4 hours.
Initial Response Time for P3 and P4 cases	• Start condition: State of the case is New and Priority is P3 or P4. • Stop condition: State is not New or Draft. • Schedule: 8am-5pm weekdays excluding holidays. • Duration: 8 hours. Duration: 8 hours.

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SLA	Description
Resolution SLA for P1 and P2 cases	• Start condition: State of the case is New and Priority is P1 or P2. • Pause condition: State of the case is Awaiting information. • Resume condition: State of the case is not Awaiting information. • Stop condition: State of the case is Resolved. • Schedule: None (24x7) • Duration: 2 days.
Resolution SLA for P3 and P4 cases	• Start condition: State of the case is New and Priority is P3 or P4. • Pause condition: State of the case is Awaiting information. • Resume condition: State of the case is not Awaiting information. • Stop condition: State of the case is Resolved. • Schedule: 8am-5pm weekdays excluding holidays. • Duration: ???.

Invoice case type

The Case Management for Invoice Operations application includes the **Invoice** case type. This case type captures the case information for invoice-related issues.

In addition to the fields on the customer service case record, the Invoice Case table [sn_csm_invoice_case] includes the following fields:

- **Invoice number**: The invoice number that the invoice case has been opened for.
- **Request source**: The source of the invoice case. Invoice cases can be created from the following sources:
  - Specific invoice lines, single invoice
  - Invoice header details, multiple invoices

For more information about case types, see Customer service case types.

To view the Invoice case type, navigate to **All** > **Customer Service** > **Case Types** > **Manage Case Types** and select **Invoice**.

Invoice case form views

The Case Management for Invoice Operations application includes form views to display invoice cases in CRM Workspace and in the Core UI.

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This application uses the CSM default record page to display Invoice case records in CRM Workspace.

Invoice cases include the following related lists:

- Invoice Case Lines: Includes the individual case line records for this invoice case.
- Tasks: Includes tasks that have been created for this invoice case.
- Case Line Tasks: Includes tasks that have been created for individual case lines.

For more information, see the following topics:

- Invoice case form
- Invoice case line form

Invoice case archive rules

The Case Management for Invoice Operations application includes archive rules that archive older invoice cases.

Case Management for Invoice Operations archive rules

Archive rule	Description
Archive Invoice Case	This rule archives invoice case records that have been closed for more than 2 years. Archiving these invoice case records also archives the following records: • Invoice case tasks • Invoice case lines • Case line characteristics • Invoice case line tasks
Archive Invoice Case Line	This rule archives invoice case line records that have been closed for more than 2 years. Archiving these invoice case line records also archives the following records: • Case line characteristics • Invoice case line tasks

Invoice case records that have been archived for more than five years are deleted. Deleting these records also deletes the following records:

- Invoice case tasks
- Invoice case line items
- Case line characteristics
- Invoice case line tasks

Invoice case workflows

The Case Management for Invoice Operations application includes a subflow that provides the mapping between a customer invoice and an invoice case. The subflow **Primitives - AR Invoice**

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to CSM Invoice case request creates the data mapping between two different entities: 1) the customer invoice and 2) the invoice case.

For example, when mapping a customer invoice to an invoice case, the entities share some fields such as **Account** and **Contact**. The data mapping copies these field values from the customer invoice to the invoice case record.

To view this subflow, navigate to **All** > **Process Automation** > **Workflow Studio** and select **Subflows** on the Workflow Studio homepage.

Invoice case form

The invoice case form displays details about an invoice case.

Invoice case form fields

Field	Description
Invoice Case	
Number	The automatically generated record number. The prefix for numbers from the Invoice Case table is **INVCS**.
Channel	The method by which the customer initiated contact and the case was opened. • Web (default) • Phone • Email • Chat • Social • Community • Alert • Virtual Agent
Account	The name of the company that the invoice case is opened for.
Contact	The name of the customer contact for the invoice case.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.
Asset	The asset tag number or the serial number of the asset involved in this case.
Install Base	The Install base field helps you track which products and services have been purchased by a customer, how they have been installed or provisioned, along with the detailed configuration for each installed item.
Partner Contact	The name of the partner contact for this invoice case.
Parent	The parent record for the invoice case.

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Invoice case form fields (continued)

Field	Description
Short description	A brief description of the issue or request.
Needs attention	When checked, the system sends a notification to the agent in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Opened	The date and time that the invoice case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assignment group	The assigned customer service agent group.
Assigned to	The assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Contract	The contract number associated with the invoice case.
Entitlement	The entitlement associated with the invoice case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the **Account**, **Contract**, **Product**, and **Asset** fields. If only one entitlement is available for this case, it is automatically added to the **Entitlement** field.
Partner	The name of the partner company.
Request source	The source of the invoice case. Invoice cases can be created from the following sources: • Specific invoice lines, single invoice • Invoice header details, multiple invoices
Invoice	The invoice that the invoice case is created for.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to Resolved or Closed.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.
Additional comments (Customer visible)	Customer-viewable comments. Each comment is inserted into the Activity field when the user saves the record.

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Invoice case form fields (continued)

Field	Description
Work notes (Private)	Information about how to resolve the case, or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive notifications when work notes are added to the invoice case.
Closure Information	
Closed by	The name of the user who closed the case.
Closed	
Resolution code	The resolution provided for the invoice case:
Cause	Details about the cause of the issue or problem.
Resolution notes	Details about how the case was resolved.
Add resolution notes to comments	A check box to determine if the resolution notes are added to customer-viewable comments when the case is resolved. If selected, the resolution notes are added to the **Additional comments** (customer-visible) field. By default, the check box is cleared.
Related Records	
Incident	Displays the number of the incident record associated with this invoice record.
Problem	Displays the number of the problem record associated with this invoice record.
Change Request	Displays the number of the change request record associated with this invoice record.
Caused by Change	If a case is the result of a change, this field displays the associated change request record.

Invoice case line form

The invoice case line form displays details about an invoice case line.

Invoice case line form fields

Field	Description
Invoice Case Line	
Number	The automatically generated record number. The prefix for numbers from the Invoice Case Line table is **INVCSL**.
Parent case	The parent invoice case for this invoice case line record.
Account	The name of the company that the invoice case is opened for.
Contact	The name of the customer contact for the invoice case.

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Invoice case line form fields (continued)

Field	Description
Dispute code	Indicates the type of dispute for which the invoice case line has been created. • Incorrect product/service • Pricing discrepancy • Incorrect quantity • Incorrect customer details • Other
Short description	A brief description of the issue or request.
Description	A more detailed description of the issue or request.
Invoice line	A reference field that displays the invoice line that is being disputed.
State	The current state of the invoice case line record: • Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted • Resolved - Denied • Canceled
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
Assigned to	The agent assigned to the invoice case.
Assignment group	The group assigned to the invoice case.
Part number	
Invoiced part number	The original part number of the invoiced good or service.
Disputed part number	The disputed part number of the invoiced good or service.
Approved part number	The approved part number of the invoiced good or service.
Quantity	
Invoiced quantity	The original invoiced quantity of the invoiced good or service billed.
Disputed quantity	The disputed quantity of the invoiced good or service billed.

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Invoice case line form fields (continued)

Field	Description
Approved quantity	The approved quantity of the invoiced good or service billed.
Amount	
Invoiced amount	The amount of the invoiced good or service.
Disputed amount	The disputed amount of the invoiced good or service.
Approved amount	The approved amount of the invoiced good or service.
Discount amount	
Invoiced discount amount	The invoiced discount amount of the invoiced good or service.
Disputed discount amount	The disputed discount amount of the invoiced good or service.
Approved discount amount	The approved discount amount of the invoiced good or service.
Billing location	
Invoiced billing location	The invoiced billing location of the invoice.
Requested billing location	The requested billing location of the invoice.
Shipping location	
Invoiced shipping location	The original shipping location of the invoiced good or service.
Requested shipping location	The requested shipping location of the invoiced good or service.
Resolution	
Resolution code	The resolution provided for the disputed invoice line item. • None • Solved - Credit • Solved - Write Off • Solved - Settlement • Solved - Invalid Dispute
Close notes	Additional notes made by the user who closes the case.
Notes	
Additional comments (Customer visible)	Customer-viewable comments. Each comment is inserted into the Activity field when the user saves the record.
Work notes (Private)	Information about how to resolve the case, or steps taken to resolve it, if applicable.

Accounts Receivable (AR) invoice table

The AR invoice (sn_otc_invoice) table stores the invoice data.

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Accounts Receivable invoice table

The following table lists the fields for AR invoice [sn_otc_invoice] table.

Accounts Receivable invoice table

Field	Data type	Description
Account	Reference to Account	Customer in the business-to-business (B2B) business model.
Amount invoiced with tax (Reporting currency)	FX Currency	Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in reporting currency.
Amount invoiced with tax (Transaction currency)	FX Currency	Total amount to be paid to the supplier including tax and shipping charges. This amount is displayed in transactional currency.
Amount invoiced without tax (Reporting currency)	FX Currency	Total amount to be paid to the supplier excluding tax and shipping charges. This amount is displayed in reporting currency.
Amount invoiced without tax (Transaction currency)	FX Currency	Total amount to be paid to the supplier excluding tax and shipping charges. This amount is displayed in transactional currency.
Billing Contact	Reference to Account Contact	The account contact to which the invoice is sent.
Billing Location	Reference Location	Reference to the location to which the invoice is sent.
Bill to city	String	The city to which the invoice is sent.
Bill to country	Reference to Country	The country to which the invoice is sent.
Bill to state/ province	String	The state to which the invoice is sent.
Bill to street	String	The street address to which the invoice is sent.
Bill to ZIP/postal code	String	The zip code to which this invoice is sent.
Business owner	Reference to User	A group who owns the invoice.
Consumer	Reference to Consumer	Customer in the business-to-consumer (B2C) business model.
Created	Date/Time	Date on which this invoice is created.
Created by	String	Person who created the invoice.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
Tax Code	Reference to Tax Code	The tax code levied on the total invoice amount.
Tax Jurisdiction Code	String	The tax code jurisdiction to which you must pay the tax.
Discount (%)	Decimal	Discount % for the discounts amount.
Discount due date	Date	Date by which you must make payment for the discounts to be applicable.
Discounts Amount	FX Currency	The discount applied on the invoice amount.
Due date	Date	Date by when you must make the payment.
Early payment discount amount	FX Currency	The discount applied on the total invoice amount on early payment.
ERP number	String	Unique number generated within the ERP system for the invoice.This field is applicable when there's an ERP integration. The value is populated after the invoice is posted in the ERP system through the integration.
ERP posting date	Date	Date on which the invoice is posted in the ERP system.
Has changed	True/ False	Denotes if the invoice has changed.
Invoice date	Date	Date on which this invoice is created.
Invoice source	String	Name of the application associated with the invoice from where it is sourced.
Number	String	An auto-generated number that uniquely identifies the invoice.
Other charges	FX Currency	Additional charges incurred on the invoice.
Parent invoice	Reference to AR Invoice	Original invoice
Payment date	Date	The date by when you must make the payment.
Payment terms	Reference to payment terms	Conditions applied on the payment
Remit to Contact	Reference to Account Contact	The account contacted to which the payment is made.
Remit to Location	Reference to Location	Reference to the location to which the payment is made.
Remit to city	String	The city to which the payment is made.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
Remit to country	Reference to Country	The country to which the payment is made.
Remit to state/ province	String	The state to which the payment is made.
Remit to street	String	The street address to which the payment is made.
Remit to zip/ postal code	String	The zip code to which this payment is made.
Requires acknowledgment	True/ False	Invoice requires acknowledgment of receipt from recipient
Sales Order	Reference to Order	Sales order associated with the invoice.
Sales order number	String	Sales order associated with the invoice.
Customer tax id	String	The tax ID of the customer
Customer Contact	Reference to Account Contact	The account contact of the customer for the invoice.
Customer Location	Reference to Location	Reference to the customer location for the invoice.
Customer city	String	The city of the customer for the invoice.
Customer country	Reference to Country	The country of the customer for the invoice.
Customer state/ province	String	The country of the customer for the invoice.
Customer street	String	The street address of the customer for the invoice.
Customer zip/ postal code	String	The zip code of the customer for the invoice.
Shipping from Location	Reference to Location	Reference to the location from which the order on the invoice is shipped.
Ship from city	String	The city from which the order on the invoice is shipped.
Ship from country	Reference to Country	The country from which the order on the invoice is shipped.
Ship from state/ province	String	The state from which the order on the invoice is shipped.
Ship from street	String	The street address from which the order on the invoice is shipped.
Ship from zip/ postal code	String	The zip code from which this order is shipped.

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Accounts Receivable invoice table (continued)

Field	Data type	Description
Shipping to Contact	Reference to Account Contact	The account contacted to which the order on the invoice is shipped.
Shipping to Location	Reference to Location	Reference to the location to which the order on the invoice is shipped.
Ship to city	String	The city to which the order on the invoice is shipped.
Ship to country	Reference to Country	The country to which the order on the invoice is shipped.
Ship to state/ province	String	The state to which the order on the invoice is shipped.
Ship to street	String	The street address to which the order on the invoice is shipped.
Ship to zip/ postal code	String	The zip code to which this order is shipped.
Shipping Charges	FX Currency	Shipping charges incurred for the invoice.
Short description	String	Brief description about the invoice.
Status	String	Current state of the invoice.
Submitted by	Reference to User	Person who submitted the invoice.
Subtotal	FX Currency	The total amount from all the invoice lines without tax and shipping charges.
Supplier	Reference to Supplier	Supplier who delivers the product or service.
Supplier tax id	String	The tax ID of the supplier.
Tax amount	FX Currency	Tax applied on the invoice amount.
Tax rate decimal	Decimal	Tax rate % applied on the invoice - Tax rate in decimal if tax code is not used.
Tax Rate String	String	Tax rate % applied on the invoice - Tax rate in string if tax code and decimal is not used
Type	String	The type of invoice debit or credit.

Accounts Receivable (AR) invoice line table

The AR invoice line (sn_otc_invoice_line) table stores the invoice line data.

Accounts Receivable invoice line table

The following table lists the fields for AR invoice line [sn_otc_invoice_line] table.

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Accounts Receivable invoice line table

Field	Data type	Description
Invoice Number	Reference to AR Invoice	Parent invoice number containing the invoice lines.
Invoice line quantity	Decimal	The number of items that have been invoiced in the line.
Line item invoice with tax	FX Currency	The total cost which is being billed for this good or service with tax.
Line item invoice without tax	FX Currency	The total cost which is being billed for this good or service without tax.
Description	String	Brief description of the invoice line.
Line unit price	Decimal	Unit price of the line item in the invoice.
Part Number	String	SKU number from the product catalog
Line Item Number	String	Invoice line number
Sales Order	Reference to Order	Sales order associated with the invoice
Sales Order Number	String	Sales order associated with the invoice
Sales Order line	Reference to Order Line Item	Sales order line associated with the invoice line.
Sales Order line Number	String	Sales order line associated with the invoice line
Shipping to Contact	Reference to Account Contact	The account contact to which the order on the invoice is shipped.
Shipping to Location	Reference to Location	Reference to the location to which the order on the invoice is shipped.
Ship to city	String	The city to which the order on the invoice is shipped.
Ship to country	Reference to Country	The country to which the order on the invoice is shipped.
Ship to state/ province	String	The state to which the order on the invoice is shipped.
Ship to street	String	The street address to which the order on the invoice is shipped.
Ship to zip/ postal code	String	The zip code to which this order is shipped.
Status	String	Status of the invoice line.
Tax amount	FX Currency	Tax amount for the invoice line item.
Tax code	Reference to Tax Code	Tax code of the invoice line.
Tax jurisdiction code	String	Tax jurisdiction code of the invoice line.

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Accounts Receivable invoice line table (continued)

Field	Data type	Description
Tax rate decimal	Decimal	Tax rate % applied on the invoice line - Tax rate in decimal if tax code is not used.
Tax rate string	String	Tax rate % applied on the invoice line - Tax rate in string if tax code and decimal is not used.
Unit of Measure	Reference to Unit	Unit of Measure for the invoice line item quantity.

Creating an invoice case

Agents can create invoice cases from the Invoice Cases list view in CRM Workspace or the Core UI.

Agents can create invoice cases by selecting **New** from the Invoice Cases list view. From the Invoice case record, agents can:

- Add invoices or invoice lines to the invoice case.
- Delete invoices or invoice lines from the invoice case.
- Create new invoice case lines.
- Edit the details of invoice case lines.
- Assign invoice case lines to themselves.
- Create tasks for invoice case lines.

Selecting **Save** on the Invoice case record moves the invoice case and the invoice case lines currently in the Draft state to the New state. Once in the New state, agents can begin working to resolve the invoice case. This can include creating tasks for invoice case lines, assigning them to other agents or team members, and monitoring case progress.

Request source

An agent can create the following types of invoice cases:

- Cases that reference one or more invoice lines from a single customer invoice.
- Cases that reference multiple customer invoices.

The Invoice case record includes the **Request source** field. An agent can select the following values in this field:

- **Specific invoice lines, single invoice**: The invoice case is for a single customer invoice. The agent can select the invoice in the **Invoice** field.
- **Invoice header details, multiple invoices**: The invoice case is for multiple customer invoices.

Add invoices and invoice lines to an invoice case

Invoice cases can include a list of invoice case lines. These case lines represent either customer invoices or invoice lines from a single customer invoice.

Once an invoice case has been created, agents can add invoices or invoice lines to the case by selecting **New** from the Invoice Case Lines related list. Selecting this action displays a new Invoice Case Line record.

The agent can select an invoice line or invoice for the Invoice Case Line record and then select **Save** to add it to the invoice case as an invoice case line.

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Create an invoice case

Create an invoice case for a customer invoice or for selected invoice lines.

Before you begin

Role required: sn_csm_invoice.agent, sn_csm_invoice.manager, admin

Procedure

1. In CRM Workspace, select **New** from the Invoice Cases list view.
2. Add information to the Invoice Case form, such as **Account** and **Contact** and **Short description**.
3. Select an invoice number in the **Invoice** field.
   This field is displayed if the **Request source** field is set to Specific invoice lines, single invoice.
4. Select **Save**.
   Saving the Invoice Case form to creates the invoice case record in the Draft state.
5. View the invoice case record details and make any necessary changes.

   You can perform the following tasks while the order case is in Draft state:

   - Add invoices or invoice lines to the invoice case.
   - Delete invoices or invoice lines from the invoice case.
   - Create new invoice case lines.
   - Edit the details of invoice case lines.
   - Assign invoice case lines to yourself.
6. Select **Submit**.
   Submitting the invoice case record moves the invoice case and the invoice case lines currently in the Draft state to the New state and enables you to begin working to resolve the invoice case.

What to do next

After submitting an invoice case, you can:

- Add an invoice case line to an invoice case
- Create a task for an invoice case line

Add an invoice case line to an invoice case

Add an invoice case line to an invoice case.

Before you begin

Role required: sn_csm_invoice.agent, sn_csm_invoice.manager, admin

Procedure

1. Open an invoice case In CRM Workspace.
2. Select the Invoice Case Lines tab and then select **New**.
   This opens a new Invoice Case Line form in a separate sub tab.
3. Add information to the Invoice Case Line form.
4. Select **Save**.

   The system adds the new record to the Invoice Case Lines tab on the invoice case record.

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Create a task for an invoice case line

Create a case line task for an invoice case line.

Before you begin

Role required: sn_csm_invoice.agent, sn_csm_invoice.manager, admin

Procedure

1. Open an invoice case In CRM Workspace.
2. Select the Invoice Case Lines tab and then select an invoice case line.
3. Select **Create case line task**.
   The system opens a Create New Case Line Task form in a separate sub tab.
4. Add information to the Create New Case Line Task form.
5. Select **Save**.

   The system adds the new task record to the Tasks tab on the Invoice Case Line record.

Service definitions

Use service definitions to create connections between products, services, and case types. Customers can use these definitions to quickly discover and request the services they need. Agents can use these definitions to create cases of the correct type to support those service requests.

Overview of service definitions

The service definitions feature is available with the Customer Service Case Types plugin (com.snc.csm_case_types). Case types enable you to address specific types of customer requests. A case type extends the base customer service case and includes the processes, attributes, and data required to resolve a specific type of case, such as onboarding a customer or resolving a complaint.

Note: Ensure that you are assigned to the service_definition_admin role

A service definition describes a service that a business or organization offers to support a product or service that they sell. Service definitions work with case types to provide different types of service requests.

- You can create connections between products and services and the case types that support those services. These connections streamline the case management process for requesting and executing services and simplify service requests based on the customer's context.
- You can also create service definitions for case task types and then create parent-child relationships between case type definitions and case task type definitions. This enables agents to easily create case tasks of the correct type.
- You can create categories of services and then organize service definitions into logical groupings. Agents can use these categories to quickly find the services they need.

Service definition benefits

When you create service definitions for each of the services that you offer, agents can use the defined services to create cases and cases tasks of the correct type for customer issues and requests. When creating these cases and case tasks, agents can do the following:

- Select from a list of available services.
- Select a category and view the available services within that category.

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- Filter the applicable services based on the products owned by a customer.
- Create a case of the correct type based on the service requested or for the products owned by a customer.

Customers can use service definitions to discover and request services to support their products from the Customer and Consumer Service Portals.

Service definition categories

Service definition categories enable you to organize service definitions into logical groupings. A category can have multiple service definitions and a service definition can belong to one or more categories.

These categories appear on the case service selector and case task service selector. When an agent is creating a case or case task, the agent can select a category and then view and select from the available services within that category to create a case or case task.

Filtering service definitions

The service definitions filtering feature enables you to filter or narrow the services that are available to agents when they are creating cases.

You can filter service definitions by creating configurations that are based on two types of criteria: user and customer.

- User criteria: Filter service definitions by user criteria such as role, assignment group, or specific user. For example, in a retail organization, different services are created for various roles. Only users with specific roles, such as regional managers or operational managers, can view and use service definitions like Product Recall or New Product Launch in Store. These services are hidden from other agents who are not authorized to create such cases.
- Customer criteria: Filter service definitions by customer criteria such as location, customer level, or related entities. For example, for customers with a loyalty membership, service definitions like Free Delivery or Free Installation are made available. Customers who do not meet these criteria will not see or have access to these services.

The service definition ID field

Starting with the Washington DC release, the **ID** field replaces the **Number** field.

- For upgrade customers, the **Number** field is relabeled to show that it is deprecated.
- For new customers, the **Number** field is not present.

For customers upgrading from Utah or Vancouver, a fix script runs automatically that adds the ID field to records in the Service Definition [sn_case_type_selection] table. The fix script copies the value from the **Name** field and adds it to the **ID** field, replacing white space characters with underscores. This field has a maximum length of 40 characters.

System administrator experience

The system administrator defines the services that are offered to customers for the products and services in the product catalog. For each service definition, the admin can complete the following configuration tasks.

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Service definition configuration tasks

Task	Description
Create a service definition	The service definition record stores details about a service that is provided to customers. This information includes a name for the service definition, the target table, and the service category.
Associate one or more products	Services can be product-specific or general services can be created and made available for all products.
Associate a case type	A case type provides the processes and data that an agent needs to resolve a case for a specific type of service.
Associate a playbook	A playbook provides agents with step-by-step guidance for resolving a specific type of case.
Configure default field values	Configure default values for fields in a service definition's target table. When a record is created for this table, the system uses these values to auto-populate record fields.
Associate a record producer	Record producers enable end users to request services from the Customer and Consumer Portals.
Configure related services for a service definition	Associate one or more related services with a service definition to create parent-child relationships between service definitions. For example, you can create service definitions for case tasks and associate them with a service definition for a case type.
Create a service definition category	Create a category for service definitions. You can use these categories to create logical groupings of service definitions.
Associate service definitions with a category	Add service definitions to a category. A category can have one or more associated service definitions and a service definition can belong to multiple categories.
Add a case type to the Case interceptor	Add case types to the Case interceptor, to configure this feature for use in the Core UI.
Configure user criteria for a service definition	Add user criteria to a service definition that restricts a user's access to the service. Associate user-specific criteria such as role, assignment group, or specific user with a service definition to determine which users can access and use that service to create a case.
Configure customer criteria for a service definition	Add entity criteria to a service definition that restricts access to the service. Associate customer-specific criteria such as location, customer level, or verified status with a service definition to determine which customers are eligible for that service.

Agent experience

Associating a case type with a service definition automates the case type selection process for agents. From CRM Workspace, agents can quickly create cases of the right case type based on customer context.

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When creating cases, agents can select the appropriate service for a customer based on the products that the customer owns. The Product Service Select version of the case type selector enables agents to do the following:

- Create cases from case and case type list views.
- Create cases from several types of records:
- Select a product. The case type selector includes a **This case is for an owned product** check box.
  - If checked: Lists services relevant to the selected product.
  - If cleared: Lists all available services.
- Select a category of services and view the services within that category.
- Select a service from the list of available services.
- Select **Create Case** to create a case of the case type associated with the service.

The system automatically determines the case type based on the selected service and creates a case of that type. If the service definition has an associated playbook, the agent can use the playbook in a tab on the case record.

Note: From the Core UI, the Case interceptor enables agents to select a service definition for case type creation.

Associating a case task type with a service definition enables agents to create case tasks of the right type based on the case context. The Product Service Select version of the case task type selector enables agents to create tasks from case task lists, case records, playbook stages, and the Dynamic Related Records tab in the contextual side panel.

Customer experience

End users can use the service definitions feature to request available services from the Customer and Consumer Service Portals based on the products they have purchased.

- Use the portal to view the sold products or the install base items that they own.
- Select a product or an install base item and see the available services in the Services portal widget. This widget can display product-specific services, requests for new products, and general services.
- Select a service and launch a record producer to create a service request. When submitted, the system automatically creates a case of the correct type.
- View a case that was created for a service request and see the **Service definition** field on the case record.

Services portal widget

End users can view a list of available services for their sold products and install base items from the Customer and Consumer Service Portals.

From the portal, an end user can navigate to a list of their sold products or install base items. After selecting a product, the Services portal widget lists the available services. These can include:

- Services based on a sold product or install base item
- General services
- Services for requesting new products

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Selecting a service from the widget displays the record producer associated with the service definition. Depending on the record producer configuration, some of the fields are auto-filled such as the product model or install base item and the selected service. Submitting the record producer creates a case of the correct case type.

Note: Cases that have been created from a case type associated with a service definition display the service definition in the **Service definition** field. End users can see this information on the case records that they can access from the portal.

Related topics

Configuring service definitions

Customer service case types

Manage customer service case types

Create a customer service case of a specific type

Service definition roles

Service definition roles included with the Customer Service Case Types plugin enable users to view, create, and update service definitions, service definition categories, and service definition category relationships. Agents and end users can use these definitions and categories to view and create cases based on the selected service.

Service definition roles

The following service definition roles are installed with the Customer Service Case Types (com.snc.csm_case_types) plugin.

Roles installed with case types

Role	Description	Contains roles
Service definition admin [sn_csm_case_types.service_definition_admin]	Administrator role for the Customer Service case types tables. Users with this role can view, create, update, and delete service definitions, service definition categories, and service definition category relationships.	• sn_csm_case_types.service_definition_mana • sn_service_org.service_criteria_delete
Service definition manager [sn_csm_case_types.service_definition_manager]	Manager role for the Customer Service case types tables. Users with this role can view, create, and update service definitions, service definition categories, and service definition category relationships.	• sn_csm_case_types.service_definition_repor • sn_csm_case_types.service_definition_all_ta • sn_service_org.service_criteria_write • sn_service_org.service_criteria_create • sn_service_org.service_criteria_read
Service definition viewer [sn_csm_case_types.service_definition_viewer]	Users with this role can view service definitions, service definition categories, and service definition category relationships.	sn_service_org.service_criteria_read

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Roles installed with case types (continued)

Role	Description	Contains roles
Service definition report viewer [sn_csm_case_types.service_definition_report_view]	Provides report view access to service definition related tables.	None
Service definition all table viewer [sn_csm_case_types.service_definition_all_table_viewer]	Provides view access to the service definition tables. Users with this role can view service definitions, service definition categories, and service definition category relationships.	None

How users can use service definitions

In CRM Workspace, users with the admin role or one of the following agent roles can access the **Service** field for cases and case tasks.

- Customer service agent (sn_customerservice_agent)
- Consumer service agent (sn_customerservice.consumer_agent)
- Customer service manager (sn_customerservice_manager)

The admin and agent roles can do the following:

- See the **Service** column on Case Task lists. For example, My Case Task and My Contributing Tasks.
- See the **Service** field on the Case Task form.
- Select a service in the **Service** field and save the Case Task form.
- Create a case task and see the **Service** field on the Case Task form.

In the Core UI, users with the admin role or one of the agent roles listed above can do the following:

- See the **Service** column on Task list.
- See the **Service** field on the Task form.
- Select a service in the **Service** field and save the Case Task form.

From the Customer and Consumer Service Portals, users with the admin role or an end user role can see the **Service** field on case tasks that the user has access to. See the following table for the end user roles that can see this field.

End users and roles that can see the Service field on case tasks

Users and Roles	Description
B2B user roles	
Customer service agent [sn_customerservice.customer]	An agent who assists customers and partners with questions, issues, and problems.

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End users and roles that can see the Service field on case tasks (continued)

Users and Roles	Description
Customer administrator [sn_customerservice.customer_admin]	An administrator role for a customer account. This user has access to all of the data within the account.
Customer case manager [sn_customerservice.customer_case_manager]	A customer role for managing the cases in an account and any related child accounts.
Partner [sn_customerservice.partner]	A partner who is serving customer accounts.
Partner administrator [sn_customerservice.partner_admin]	An administrator role for a partner account.
Case task agent [sn_customerservice.case_task_agent]	A role that provides access to case tasks and related case information.
Case task viewer [sn_customerservice.case_task_viewer]	A role that provides read-only access to all case task records.
Customer contacts with configured contact relationships	For more information, see Contact Relationships.
B2C user roles	
Consumer service agent [sn_customerservice.consumer_agent]	An agent who assists consumers with questions, issues, and problems.
Consumers with configured consumer relationships	Use relationships to provide internal and external users with additional access to customer data. For more information, see Create relationships.
Consumers who are designated as head of household	A household is made up of a group of consumers who live at a common address and share products and services. A household can have a designated head of household and multiple current members. For more information, see Create or update a household.
Contributor roles	
Account contributor [sn_customerservice.account_contributor]	This role enables users to create cases and case tasks for any account.
Consumer contributor [sn_customerservice.consumer_contributor]	This role enables users to create cases and case tasks for any consumer.

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End users and roles that can see the Service field on case tasks (continued)

Users and Roles	Description
Self contributor [sn_customerservice.self_contributor]	This role enables users with snc_internal role to create cases and case tasks for themselves.
Location manager contributor [sn_customerservice.svc_location_manager_contributor]	A location manager contributor is employed at the business location and manages a business location in the location hierarchy along with all its child business locations.
Location agent [sn_customerservice.svc_location_agent]	• View all CSM entities. • Create cases for any account, household, consumer, or service organization. • Fulfill cases for any account, household, consumer, or service organization created at the agent's location.
Location consumer agent [sn_customerservice.svc_location_consumer_agent]	• View all CSM entities. • Create cases for any household or consumer. • Fulfill cases for any household or consumer created at the agent's location. • Assign related staff to any account, household, or consumer.
Relationship contributor [sn_customerservice.relationship_contributor]	This role enables users to create cases for customers with which they have an established relationship.
Relationship agent [sn_customerservice.relationship_agent]	Manage cases for the accounts, contacts, consumers, and households that the agent has relationships with. This includes the following relationships that are provided with the Service Model Foundation plugins: • Account Manager: Creates a relationship between an internal user and an account. • Relationship Manager: Creates a relationship between an internal user and a consumer or a household.
Location relationship manager [sn_bus_loc.location_relationship_manager]	A location relationship manager is employed by the parent business and acts as a point of contact for one or more external business locations.
Service organization contributor [sn_customerservice.service_organization_contributor]	This role enables users to create cases for their service organization (business location)

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End users and roles that can see the Service field on case tasks (continued)

Users and Roles	Description
Case Authorized Contributor [sn_customerservice.case_authorized_contributor]	This role provides access to add additional comments and attachments, accept or reject a solution, receive notifications on case updates, close a case, and update case tasks.
Outsourced external agent [sn_csm_ocs.ext_agent]	An Outsourced Service Provider (OSP) role. Users with this role can fulfill the cases and case tasks belonging to the service provider organization they belong to.

For more information about these roles, see the following topics:

- Roles installed with Customer Service Management
- Contributor user roles
- Service Model Foundation - Assign roles
- Roles installed with customer access management
- Roles for Outsourced Customer Service

Related topics

Configuring service definitions

Customer service case types

Manage customer service case types

Create a customer service case of a specific type

Service definitions with catalog items

Enable service definitions to use service catalog items. Agents can select these catalog items and use the associated record producers to create cases of the correct type in CRM Workspace.

Users with the admin role can configure service definitions to use service catalog items. These catalog items are displayed as cards in the service selector. If a service definition has more than one associated service catalog item, the system shows all of the associated catalog items as cards in the service selector.

When an agent selects a catalog item from the service selector, the system displays the record producer associated with the catalog item in a workspace record page. Completing and submitting the record producer creates a case of the correct type and displays the case in CRM Workspace.

Configuring a service definition to use catalog items

Users with the admin role can configure a service definition to use catalog items.

1. Create a service definition or edit an existing service definition record.
2. Enable the **Use service catalog item** field.
3. Add the associated catalog items for this service definition to the Catalog Service Relationships related list.

For more information, see Configuring service definitions.

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Using a service definition with catalog items to create a case

For service definitions that are configured to use catalog items, agents can create cases by selecting a catalog item from the service selector. The system displays the record producer page associated with the catalog item in CRM Workspace.

The agent adds information to the record producer fields and selects **Submit**. The system creates the case and displays the record page for the correct case type.

Information messages

If a service definition is configured to use service catalog items but does not have any associated catalog items in the Catalog Service Relationships related list, the system displays the following message: "A service definition has the "Use service catalog item" field enabled but has no associated catalog items for the user to select."

If an agent does not have access to the catalog item associated with a service definition, the system displays following message: "You do not have access to the selected catalog item. Request access from your manager so that you can use the catalog item to create a case."

Service Definition record

The Service Definition record includes the **Use service catalog item** field. When this field is enabled, the system displays the catalog items in the service selector that are associated with the service definition.

The Catalog Service Relationships related list stores the catalog items that are associated with the service definition. A service definition can have one or more associated catalog items.

Users with the admin role can enable the **Use service catalog item** field on the Service Definition record and associate service catalog items in the Catalog Service Relationships related list.

CSM record producer page

The CSM record producer page includes the service catalog UI Builder component, which can be associated with a record producer and displays the record producer fields.

The CSM record producer page is displayed for all service definition records that have the **Use service catalog item** field enabled and one or more associated catalog items.

Selecting a catalog item in the service selector displays the CSM record producer page in CSM Configurable Workspace. Completing and submitting the record producer displays the record page for the correct case type.

Default page settings:

- Page name: CSM record producer page
- Table: Record Producer [sc_cat_item_producer]
- Order: -1000

Service recommendations for interactions

Recommend the most relevant services to an agent based on the context of an interaction record, such as the short description or description.

With Service recommendations for interactions, agents can see the recommended services in the case type selector based on the information provided in the interaction record.

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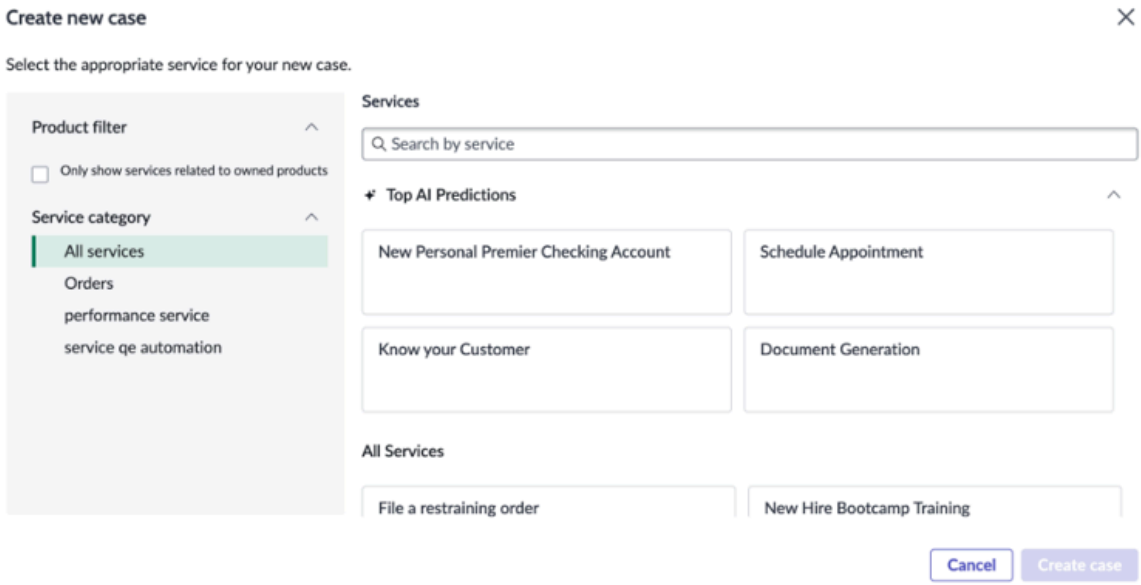
Note: The service recommendations for interactions feature requires the Now Assist for Customer Service Management (CSM) application.

The system displays the recommended services in a separate section at the top of the case type selector. By default, this section shows a maximum of four recommended services. The number of recommended services that can be displayed is controlled by the *sn_csm_case_types.top_ai_predictions_limit* system property.

Case type selector with Top AI Predictions



Service recommendations for interactions properties

The Service recommendations for interactions feature includes the following properties.

Service recommendations for interactions properties

Property name	Description
sn_csm_case_types.top_ai_predictions_enabled	Enables AI predictions for services and displays those services in the case type selector. • **Type**: true|false • **Value**: true • **Location**: System Property [sys_properties] table
sn_csm_case_types.top_ai_predictions_limit	Sets the maximum number of AI predicted services to display in the case type selector. • **Type**: integer • **Value**: 4 • **Location**: System Property [sys_properties] table

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Related topics

Configure service recommendations for interactions

Create a case based on service definition recommendations

Configuring service definitions

Create service definitions for the types of services required to support your products. Associate different features such as case types, playbooks, and record producers with service definitions so that customers can request the services they need and agents can create cases of the right type to support those services.

System administrators can use the service definitions feature to define the services that are offered to customers and connect those services to products, case types, playbooks, and catalog items.

Service definition configuration tasks

Task	Description
Create a service definition	Create a definition for a service that's offered to support a product.
Associate a product with a service definition	Configure the relationship between a product and service.
Associate a case type with a service definition	A case type defines the case resolution process for a service definition.
Associate a playbook with a service definition	A playbook provides step-by-step guidance for resolving a specific type of case. Defining a playbook record generator view enables case creation for a requested service.
Configure user criteria for a service definition	Configure user criteria for a service definition that restricts access to the service. Associate user-specific criteria such as role, assignment group, or specific user with a service definition to determine which users can access and use that service to create a case.
Configure customer criteria for a service definition	Configure customer criteria for a service definition that restricts access to the service. Associate customer-specific criteria such as location, customer level, or verified status with a service definition to determine which customers are eligible for that service.
Configure default field values for a service definition	Configure default values for fields in a service definition's target table. When a record is created for this table, the system uses these values to auto populate record fields.
Configure catalog items for a service definition	End users can select a catalog item from the service portal and use the record producer to create the service request.
Configure related services for a service definition	Associate one or more related services with a service definition to create parent-child relationships between service definitions. For example, you can create service definitions for

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Service definition configuration tasks (continued)

Task	Description
	case tasks and associate them with a service definition for a case type.
Associate service organizations with a service	After creating a service definition, you can associate organizations offering service with a service organization.
Create a service definition category	Create a category for service definitions. You can use these categories to create logical groupings of service definitions.
Associate service definitions with a category	Add service definitions to a category. A category can have one or more associated service definitions and a service definition can belong to multiple categories.
Add a case type to the Case interceptor	In the Core UI, the Case interceptor lists the types of customer service cases that an agent can create. If you create a case type and you want that case type to appear in the Case interceptor, you need to add it to the Case interceptor configuration.

Create a service definition

Create a service definition record in the Customer Service Management (CSM) application to establish connections between products, services, and case types.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A service definition record stores the details about a service that is provided to customers. You can create service definitions for the types of services that are required to support your products and for cases, case types, and case tasks.

After creating a service definition, you can associate the service definition with a product. By associating one or more related services with a service definition, you can create parent-child relationships between the service definitions.

You can also create relationships between the service definition and other related services. For example, you can create a service definition for a case and then create one or more service definitions for your case tasks. Afterward, you can establish a relationship between the case service definition and the case task service definitions.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select **New**.
3. In the **Name** field, enter a name for the service definition.
4. If necessary, modify the information in the **ID** field.

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The system auto-populates the **ID** field with the name of the service definition and replaces the spaces with underscores. The ID can contain alphanumeric characters and underscores and can be up to 40 characters in length.

Note: The value in this field must be unique.

5. In the **Table** field, select the table that the service definition is available for.
   For example, if the service is available for the onboarding case type, select the Onboarding Case [sn_onboarding_case] table.
6. **Optional:** In the **Customer service type** field, select a service type for the service definition.

   A service type enables the system to show the following type of services based on the context:

   - Pre-sale
   - Post-sale
   - General
7. **Optional:** In the **Playbook record generator** field, select a playbook record generator.
   If a service definition has an associated playbook, the agent can use the playbook in a tab on the case record. For more information, see Associate a playbook with a service definition.
8. **Optional:** In the **Image** field, select an image for the service definition.
   Service definitions appear in the case type selector in a card view. The image appears in the card for a service definition along with the name and description.
9. **Optional:** In the **Default table field values** field, select one or more fields and values.
   Configure the default values for the fields in the target table for service definitions. When a record is created for this table, the system uses these values to automatically fill in the record fields. For more information, see Configure default field values for a service definition.
10. **Optional:** In the **Order** field, add an order value for the service definition.
    This value determines the order in which the services are displayed in the case type selector or other workflows. Service definitions with the lowest order value are displayed first. The default value is 100.

    - Service definitions with no order value appear after the ordered service definitions. These service definitions have the lowest priority.
    - If one or more service definitions have the same order value, the system displays the service definitions in alphabetical order.
11. **Optional:** Enable the **Active** check box.
12. **Optional:** Enable the **Use service catalog item** check box.
    When this check box is enabled, the service definition can use catalog items and their associated record producers to create cases in CRM Workspace. The Catalog Service Relationships related list stores the catalog items that are associated with the service definition. For more information, see service definition use service catalog items.
13. **Optional:** In the **Description** field, add a description of the service definition.
    Service definitions appear in the case type selector in a card view. The card includes the name, description, and image for a service definition. Customer service agents can search for services by entering keywords found in the service definition name and description.
14. Select **Submit**.
    The service definition is added to the Service Definitions list.

    Upon save, the service definition record includes the following related lists:

    - Product Service Relationships
    - Catalog Service Relationships

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- Service to Service Relationships
- Service Definition Category Relationships
- Reports

Result

After creating a service definition, you can perform the following configuration tasks:

- Associate one or more products with a service definition
- Create a service definition category
- Associate a product with a service definition
- Associate a case type with a service definition
- Associate a playbook record generator with a service definition
- Associate a service definitions to a service definition category
- Configure default field values for a service definition
- Configure catalog items for a service definition
- Configure related services for a service definition.
- Associate service organizations with a service.
- Add a case type to the Case interceptor.

Create a service definition category

Create a service definition category record in the Customer Service Management (CSM) application. Then use the category to create logical groupings of service definitions.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A category can have one or more associated service definitions and a service definition can belong to multiple categories.

When an agent is using the case type selector to create a case, they can select a category before selecting a service. The category acts as a filtering mechanism and reduces the number of available services.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definition Categories**.
2. From the Service Definition Categories list, select **New**.
3. In the **Name** field, enter a name for the category.
   The category name can be up to 60 characters in length.
4. **Optional:** In the **Description** field, add a description of the category.
   The description can be up to 4000 characters in length.
5. **Optional:** In the **Order** field, add an order number for the category.
   The order value determines the order in which the categories are displayed in the case type selector and case task type selector. The category with the lowest value is displayed first.

   (Optional) The default value is 100. You do not have to set an order value for a category. If a category does not have a value, the system displays the category in the case type selector in alphabetical order.

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6. **Optional:** Enable the **Active** check box.
   This field is enabled by default.
7. Select **Submit**.
   The category is added to the Service Definition Categories list.

   Upon save, the new category record includes the Service Definition Category Relationships related list, which shows the service definitions associated with the category.

Result

After creating a service definition category, you can associate service definitions with the category. These associated service definitions are stored in the Service Definition Category Relationships related list.

Associate a product with a service definition

After creating a service definition, you can associate one or more product models or sold products with the definition.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A product model or a sold product can have multiple services associated with it.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Product Service Relationships related list, select **New**.
   The system displays a new Product Service Relationship record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. Determine if this service definition is available for all products or for a specific product.
   - If it is available for all products, enable the **All products** check box and go to step 6.
   - If it is available for a specific product, leave the check box empty and go to the next step.
5. Select the product in the **Product** field.
6. Select **Submit**.
   The relationship record is added to the Product Service Relationships related list. If the relationship is for a specific product, the name is displayed in the **Product** column.

Associate a case type with a service definition

After creating a service definition, you can associate a case type with the definition.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A case type can be associated with one or more service definitions.

To see the service definitions associated with a case type, navigate to **All** > **Customer Service** > **Case Types** > **Manage Case Types** and select a case type from the list. This information is displayed in the Service Definitions related list.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the **Table** field, select the table for the case type that extends the Case table (sn_customerservice_case).
   For example, to associate the service definition with the complaint case type, select the Complaint Case table (sn_complaint_case).
4. Select **Update**.

Associate a playbook with a service definition

After creating a service definition, you can associate a playbook with the definition.

Before you begin

Role required: (playbook_experience.admin + sn_csm_case_types.service_definition_manager) or admin

About this task

Note: To see the playbook record generator field and values on the list and form view, the service def manager needs the playbook_experience.admin role in addition to sn_csm_case_types.service_definition_manager. Please add this role to associate a playbook with a service definition.

A playbook provides agents with step-by-step guidance for resolving a specific type of case. If a service definition has an associated playbook, the agent can use the playbook in a tab on the case record.

When the agent selects **Create Case** on the case type selector screen, the system displays the new case record and launches the playbook associated with the service in a tab on the record page.

Note: This is an optional task.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. Select a playbook record generator in the **Playbook record generator** field.
   This field is a reference to the Playbook Experience Record Generator table (sys_playbook_experience_record_generator). For more information, see Playbook record generator
4. Select **Update**.

Associate a service definition with a service definition category

After creating a service definition category, you can associate one or more service definitions with the category.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

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About this task

Service definition categories enable you to organize service definitions into logical groupings. A category can have multiple service definitions and a service definition can belong to one or more categories.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definition Categories**.
2. Select a category from the Service Definition Categories list.
3. In the Service Definition Category Relationships related list, select **New**.
4. Select a service definition in the **Service Definition** field.
5. Select **Submit**.
   The service definition is added to the Service Definition Category Relationships related list.

Configure user criteria for a service definition

After creating a service definition, configure user-specific criteria to control which users can access and use that service definition to create a case.

Before you begin

Role required: admin, sn_csm_case_types.service_definition_admin, or sn_csm_case_types.service_definition_manager

About this task

You can associate user-specific criteria such as role, assignment group, or specific user with a service definition to determine which users can access and use that service to create a case.

For example, you can configure user criteria for service definitions like Product Recall or New Product Launch in Store so that only regional managers or operational managers in designated groups can use those services to create cases.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Service Definition User Criteria related list, select **New**.
   The system displays a new Service Definition User Criteria record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. In the **User criteria** field, select a user criteria record.
   These records are stored in the User Criteria [user_criteria] table.

   You can also create a user criteria record by selecting **New** on the User Criteria pop-up window and filling in the fields on the User Criteria form.

   For more information about the fields on this form, see User criteria form.
5. Enable the **Active** check box.
6. Select **Submit**.

Configure customer criteria for a service definition

After creating a service definition, configure customer-specific criteria to determine which customers are eligible for that service.

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Before you begin
Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
You can associate customer-specific criteria such as location, customer level, or related entities with a service definition that determine which customers are eligible to receive that service.

For example, you can configure customer criteria for service definitions like Free Delivery or Free Installation so that only customers who are loyalty members are eligible to receive these services.

You can associate several criteria, or conditions, with a single service definition. Customers need to match only one of these conditions to have access to the service.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Service Definition Customer Criteria related list, select **New**.
   The system displays a new Service Definition Customer Criteria record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. In the **Customer criteria** field, select a customer criteria record.
   These records are stored in the Entity Criteria [sn_req_criteria_customer_condition] table.

   You can also create a customer criteria record by selecting **New** on the Entity Criteria pop-up window and filling in the fields on the Entity Criteria form.

   For more information, see Create entity criteria.
5. Enable the **Active** check box.
6. Select **Submit**.

Create entity criteria

Create an entity criteria record to define customer-based conditions, either for selected accounts (B2B) or consumers (B2C). These criteria can be applied to filter which customers are eligible for specific services.

Before you begin
Role required:sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task
You can select entity criteria records when you configure customer criteria for a service definition. The system uses this configuration to determine which customers are eligible for that particular service.

Note: Entity criteria records are available for all CSM applications.

Procedure
1. Navigate to **All** > **Service request operations** > **Entity criteria**.
2. Select **New**.
3. On the form, fill in the fields.

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Entity criteria form

Field	Description
Name	Name of the entity criteria.
Condition for	The type of customer for which the condition applies. There are two types of customers: ○ Select **Account** for B2B customers. ○ Select **Consumer** for B2C customers.
Condition on	The table on which the conditions in the condition builder apply. For example, Customer Account [customer_account]. The selected table determines the visibility of the **Customer field** and the available elements in that field.
Condition	Use the condition builder to select the conditions that apply to this entity criteria record, such as location or account type.
Customer field	Field that references the account, consumer, or other selection in the **Condition for** field from the table selected in the **Condition on** field. For example: ○ If **Condition for** is set to **Account** and if **Condition on** is set to Account Address [account_address_relationship], then you can select a field like **Account**. ○ If **Condition for** is set to **Consumer** and if **Condition on** is set to Interaction [interaction], select a field like **Consumer**.

4. Select **Submit**.

Configure default field values for a service definition

Configure default values for fields in a service definition's target table. When a record is created for this table, the system uses these values to auto populate record fields.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

The target table for a service definition is stored in the **Table** field. The table selected in this field is the Case table or a table that extends the Case table. When a record is created for the target table, the system auto populates fields with the default values.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.

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3. In the **Default table field values** field, select a field and a value.
   Each time you select a field, an additional selection option becomes available.
4. **Optional:** To remove a field, select the Delete button next to the field value.
5. When you are finished selecting fields and values, select **Update**.

Configure catalog items for a service definition

After creating a service definition, you can associate one or more catalog items with the definition.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

A catalog item is a product or service that is available within a service catalog. A record producer is a specific type of catalog item that enables users to create task-based records.

From the Customer and Consumer Portals, end users can select available services from the Services portal widget. Selecting a service displays the record producer associated with the service definition. Submitting the record producer creates a case of the correct case type.

A variable set for service definitions is available with the Customer Service Case Types plugin (com.snc.csm_case_types). This variable set populates the service definition based on the product and/or service selected on the record producer.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Catalog Service Relationships related list, select **New**.
   The system displays a new Catalog Service Relationship record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. Select a catalog item in the **Catalog Item** field.
5. Select **Submit**.
   The catalog item is added to the to the Catalog Service Relationships related list.

Related topics

Service Catalog items

Create or edit a catalog item

Configure related services for a service definition

After creating a service definition, you can associate one or more related services with the service definition. This creates a parent-child relationship between service definitions.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

When creating relationships between services on the Service to Service Relationship record, only one relationship between the related service definition and the service definition can exist.

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Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Service to Service Relationships related list, select **New**.
   The system displays a new Service to Service Relationship record. The **Service definition** field is auto-filled with the name of the selected service definition.
4. Select a related service in the **Related service definition** field.
   From the Service Definitions pop-up window, you can select the target table in the **Table** field and then select from the list of related services for that table.

   Note: You cannot relate the same service to a parent service more than once.

5. Select **Submit**.
   The related service is added to the to the Service to Service Relationships related list. The **Table** column displays the name of the target table for the related service.

Associate service organizations with a service

Associate your service organizations with a service by using the Customer Service Management (CSM) application. With this association, your service organization (SO) staff can address customer queries for products and services offered at the business location and can raise a case on the behalf of the customer.

Before you begin

Role required: sn_csm_case_types.service_definition_manager, sn_csm_case_types.service_definition_admin, or admin

About this task

An SO can have multiple services associated with it. A service-to-service organization criteria association is contained in the Organizations offering Service [service_organizations_offering_service] table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Service Definitions**.
2. Select a service definition.
3. In the Organizations offering Service related list, select **New**.
4. On the form, fill in the fields.

Organizations offering Service form

Field	Data type	Description
Organization criteria	Reference	Criteria to define the service organizations that provide the service.

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Field	Data type	Description
		Note: For more information about the criteria for the service organization, see Create the criteria for a service organization.
Service definition	Reference	Service that the service organizations provide. **Note:** The **Service definition** field is automatically filled in with the name of the selected service definition.
Active	True/False	Check box to activate or deactivate the organization criteria. By default, the active field is set to **True**. **Note:** Only one active criterion is enabled per table to be associated to a service definition.

5. Select **Submit**.
   The organization criteria are added to the Organizations offering Service related list.

Add a case type to the Case interceptor

In the Core UI, the Case interceptor lists the types of customer service cases that an agent can create. If you create a case type and you want that case type to appear in the Case interceptor, you need to add it to the Case interceptor configuration.

Before you begin

Role required: sn_csm_case_types.service_definition_admin or admin

About this task

When an agent creates a case, they can select the case type from the Case interceptor.

Procedure

1. Navigate to **All** > **System Definition** > **Interceptors**.
2. Select the Case interceptor from the Interceptors list.
3. In the Answers related list, select **New**.
4. Select **Simple questions to redirect the URL**.

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5. Fill in the fields on the Answer form.

Answer form fields and descriptions

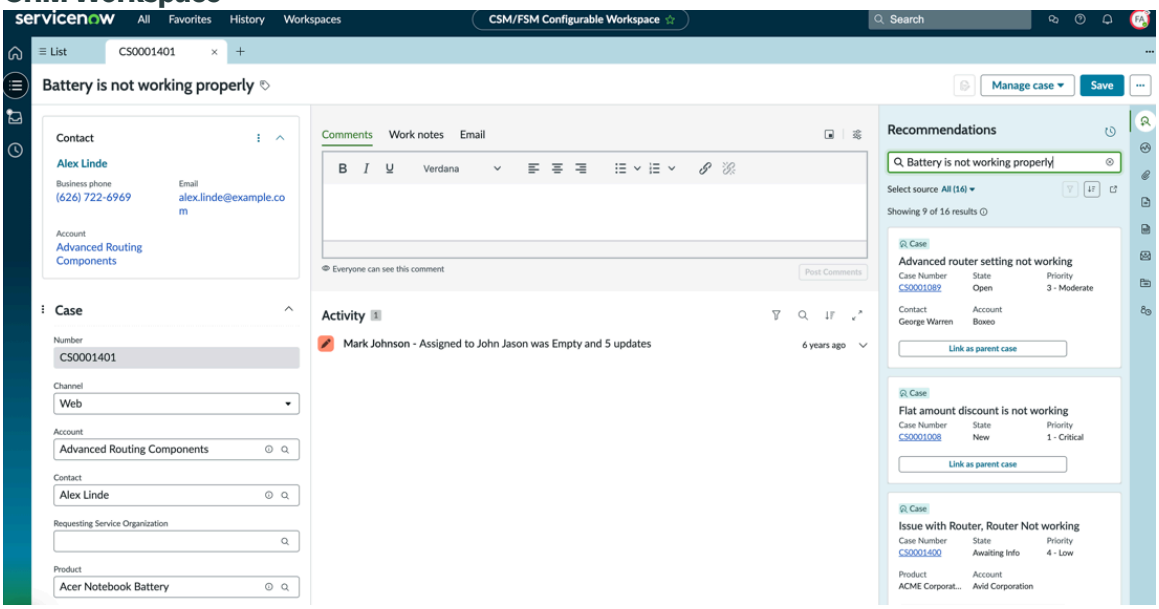
Field	Description
Name	Enter a unique name for the case type. For example, Complaint.
User Prompt	The description that the agent sees in the interceptor when they create a case.
Target URL	The target URL of the form view that should open for the selected case type.
Order	The order in which the case type appears in the interceptor.

6. Select **Submit**.

CRM Workspace

CRM Workspace is a user interface that provides customer service agents with the tools they need to assist customers, answer questions, and resolve issues quickly and efficiently.

CRM Workspace



CRM Workspace provides agents with a unified workspace to handle customer requests. Agents can manage cases, accounts, and contacts from multiple channels, like email, voice, and chat on a single screen, eliminating the need to switch between tabs.

CRM Workspace features

Key features of CRM Workspace include list views for managing cases, interactions, and other records and tabs for multitasking. It also provides agents with the ability to access customer history and context without leaving the main screen.

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CRM Workspace features

Feature	Description
Unified workspace	Provides the tools and information that an agent needs into a single, customizable interface.
List views	Provide filtered lists of cases, interactions, and other records such as accounts and contacts. Agents can also create and save their own lists.
Multi-tab interface	Tabs and subtabs enable agents to work on multiple cases, tasks, and other customer records within a single browser window. Agents can quickly move between records without losing their place.
Contextual display	Agents get a complete view of a customer's history, including interactions, products, and cases.
Channel integration	Agents can manage customer interactions from various channels, including email, chat, and phone, all within the same interface.
Contextual side panel	A configurable panel that provides agents with additional tools and information such as search, Recommended Actions, attachments, and templates.
AI tools	Summarize interaction chats and calls, summarize case information, and generate case resolution notes.

For more information, see CRM Workspace features.

CRM Workspace benefits

The ServiceNow Configurable Workspace UI is designed to improve user efficiency and facilitate resolutions. CRM Workspace, which is built from the Configurable Workspace UI, is specifically designed for customer service agents.

CRM Workspace brings together customer information, case management, and collaboration tools into a single window. This user experience enables agents to manage several cases and interactions across different channels at the same time.

CRM Workspace presents the Core UI lists and forms in one interface and consolidates multiple tabs into a single, focused work area. From this single view, agents can:

- Work on multiple issues concurrently in an intuitive layout, reducing context and tab switching.
- Resolve issues faster with automated suggestions powered by machine learning.
- Get notified of potential major incidents based on issue frequency and impact.
- Keep informed of updates and surface important insights with a live activity feed and analytics.

For more information, see CRM Workspace overview.

Application information

The CRM Workspace plugin (com.snc.uib.csm_agent_workspace) is activated with the Case Management Core plugin (com.sn_customerservice).

Note: Starting with the Yokohama release, CRM Workspace has a dependency on the Customer Central plugin. For more information, see Customer Central plugin.

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The CRM Workspace application is available from the ServiceNow Store.

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.

Related topics

List of workspaces

Configurable Workspace glossary

CRM Workspace overview

CRM Workspace is a ServiceNow workspace specifically designed for customer service agents. This workspace is designed to improve user efficiency and facilitate resolutions and can be configured using UI Builder.

The configurable workspace UI provides a suite of tools in a single focused work area. It displays the lists and forms that agents are used to working in within the Core UI. It also includes features that enable agents to be more efficient, manage multiple cases, and quickly orient themselves to the current task.

CRM Workspace and UI Builder

ServiceNow configurable workspaces use content pages to display list, table, and record information. These pages contain layouts and components that provide building blocks for creating user interfaces.

Some record pages are provided with the CRM Workspace application, such as the CSM default record page and the CSM Interaction record page.

You can customize these content pages and create content pages for workspaces using UI Builder, a web user interface builder. With UI Builder, you can:

- Create pages and page variants, tailoring workspace pages for multiple user roles.
- Configure page layouts, containers, and components, drawing from the library of reusable Next Experience components.
- Customize components for page layouts, content, data visualization, messaging, and navigation.

For more information about working with content pages and components, see the following topics:

- CRM Workspace record pages
- Creating pages and page variants
- Creating configurable workspace experiences and pages
- Work with components.
- Next Experience Components documentation.

Viewing information in CRM Workspace

Agents can view information in different ways in CRM Workspace including landing pages and dashboards, list pages, and record pages.

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Viewing information in CRM Workspace

Information	Description
Landing pages	Landing pages provide agents with a starting point to get into their work. These pages can include filtered lists such as assigned cases and case tasks, key performance indicators (KPIs), and other metrics. Agents can quickly scan the information presented on a landing page and prioritize cases and case tasks, access records, and track their performance.
Dashboards	Dashboards provide an overview of information such as filtered lists, reports, and performance analytics. Dashboards are flexible and easily customizable so agents can display the information they need.
List pages	A list displays records from a database table. CRM Workspace uses list pages to display list information such as cases and case tasks. These pages help agents navigate, filter, and manage records.
Record pages	A record displays the information from one record in a database table. CRM Workspace uses record pages to provide the base structure for how that information is displayed. Record pages include elements such as layouts, containers, and components to display record information.

CRM Workspace base experience

The CRM Workspace base experience provides a ready-to-use workspace to help you begin optimizing your service operations. The workspace includes key components that are immediately accessible and that support both customer service agents and managers in their daily activities.

Landing page

The landing page serves as an initial view of the workspace. The CSM workspace landing page provides customer service agents and managers with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Agents use landing pages as a starting point to get into their work. From the landing page, they can quickly scan and prioritize cases and case tasks, access records, and track their performance.

Lists

CRM Workspace uses list pages to display record information such as cases and case tasks. These pages help agents navigate, filter, and manage records.

Several default lists are available for use, including Cases, Interactions, Knowledge, and Tasks. Each list is structured to display key columns that provide agents with essential information at a glance.

Record pages

CRM Workspace record pages provide the base structure for how a record is displayed in the workspace. These pages present the essential fields and related information agents need to resolve customer issues, including customer information, customer history, interactions, SLAs, and much more. Review the record pages available with the CRM Workspace here.

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Responsive interface

CRM Workspace offers agents the ability to personalize their workspace interface for optimal productivity. Display, theme, and notification preferences enable agents to control information density (comfortable or compact modes), choose color schemes (light or dark mode), and manage alerts. Workspace pages automatically adapt their layout for desktop, tablet, and mobile devices.

Workspace naming

By default, the name of the workspace included with the Customer Service Management application is CRM Workspace.

Note: Starting with the Brazil release, the name of the CSM/FSM Configurable Workspace has changed. The workspace name is dependent on the installed products.

- CRM Workspace: For customers using the Customer Service Management application or working in the Customer Relationship Management (CRM) environment.
- Industry-specific names: For customers using any of the industry products, such as Financial Services or Public Sector.

You can change this name by setting the **experienceTitleAlias** field on the UX Page Properties record (sys_ux_page_property.list).

If multiple aliases are found within the same workspace, the number in the **Order** field on the UX Page Properties record determines which alias is used. The alias with the lowest order number is used for the workspace name display.

CRM Workspace features

CRM Workspace provides several different tools and features that agents can use to assist customers, research issues, and resolve cases.

CRM Workspace features

Feature	Description
Multi-tab interface	Displays information using tabs and sub-tabs which enable agents to work on multiple cases, tasks, and other records within a single browser window. Agents can quickly move between records without losing their place.
Contextual display	Displays information that provides agents with a complete view of a customer's history, including interactions, products, and cases.
Agent inbox	Agents see their assignments in their CRM Workspace inbox. Work assignments appear as cards in the inbox that agents can either choose to accept or reject. Agents can also set their status in the inbox, such as **Available** or **Busy**.
Landing pages	A landing page is an initial view of a user's workspace. For customer service agents, the landing page can show an overview of their new, assigned, and high priority cases, plus the cases assigned to their groups.
List views	Provide filtered lists of cases, interactions, and other records such as accounts and contacts that enable agents to quickly find records and manage their work. Agents can also create

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CRM Workspace features (continued)

Feature	Description
	and save personalized lists for quick access to relevant information.
Record details	Content pages determine how information is displayed in the workspace. Record pages display information about the current record. This can include details such as the account, contact, and priority for a case record or the communication channel, short description, and state for an interaction record.
Contextual side panel	A configurable panel that provides agents with additional tools and information such as search, Recommended Actions, attachments, related lists, and templates. This access helps agents research and resolve customer issues without leaving the case view.
Activity stream	The activity stream helps agents stay informed by displaying a chronological list of updates and communications within a record like field changes, comments, work notes, and emails.
Compose	The Compose area in a configurable workspace record page enables agents to communicate with customers and other agents through comments, work notes, and emails.
Modeless dialogs	Windows that overlay the main window content in a workspace. Agents can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails.
Form templates	Use form templates to populate fields on new records with selected values. Create and edit form templates for use in CRM Workspace and then use the templates to automatically the configured fields.
Search tools	Global search enables you to search multiple record types at once from the Next Experience Unified Navigation search field. The Recommended Actions tab in the contextual side panel includes AI search functionality. This search feature displays an initial set of search results based on the text in the case short description, including knowledge articles. Agents can also enter different search keywords and repeat the search.
AI tools	Includes recommended solutions, such as knowledge articles and similar cases, and Recommended Actions. Use the ServiceNow Otto for Customer Service Management (CSM) application to summarize interaction chats and calls, summarize case information, and generate case resolution notes.
Chat summarization	The chat summarization feature automatically creates summaries of chat conversations. The agent can quickly gain an understanding of the interaction without reading the entire transcript of the conversation.

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CRM Workspace features (continued)

Feature	Description
Chat session tabs	Visual indicators on chat session tabs, such as colors and icons, alert agents to unread chat messages and SLA threshold timers.
Lookup and verify	Use this feature to enable agents to quickly look up contacts or consumers using information such as the name, phone number, or record number.
Case action status	Use the case action status feature so that agents can easily identify cases that need attention.
Display preferences	Agents can personalize their workspace to control the information density with comfy and compact modes and can choose between light and dark mode for optimal readability.
Responsive pages and resizable panes	Workspace pages adapt to any device, automatically adjusting layout for desktop, tablet, and mobile screens. Agents can resize panes and use modeless dialogs that fit their workflow.
Dynamic page views	Workspace is context aware can be tailored to support record and persona-based experiences (driven by UI Builder).

Additional applications

A number of additional applications are available for use with CRM Workspace.

Additional applications for CRM Workspace

Feature	Description
AWA for CSM	Use Advanced Work Assignment (AWA) to automatically assign work items to agents based on their availability, capacity, and skills.
Customer Central	Use Customer Central to provide agents with all of the information about a customer in one central location. This feature enables agents to quickly zoom in on the customer issue and provide efficient and supportive service.
ServiceNow Link Manager	Use the ServiceNow Link Manager feature to manage and organize browser tabs within a ServiceNow instance.
Workforce Optimization for Customer Service	Use Workforce Optimization for Customer Service to manage and maintain the productivity of your workforce. Efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.
Customer Service Case Types	Use case types to handle different types of customer issues. A case type identifies the processes and the data needed to resolve a specific type of issue, such as a lost or missing credit card.

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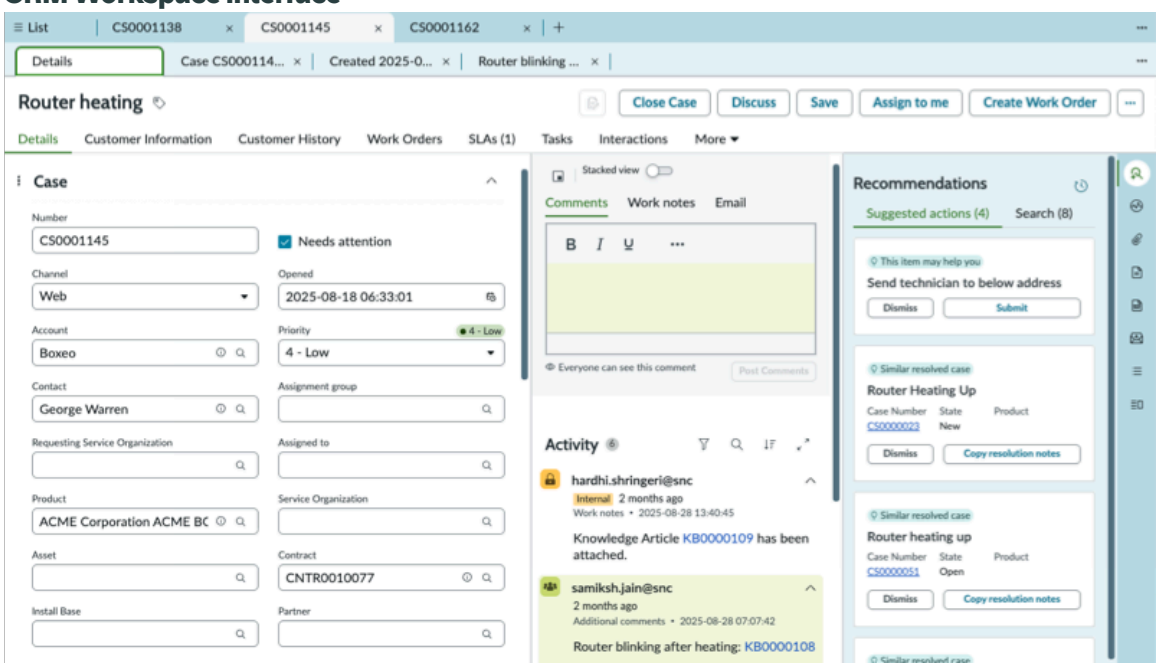
Additional applications for CRM Workspace (continued)

Feature	Description
Proactive Customer Service Operations	Use this feature to track the digital services used by your customers and to proactively create cases for service disruptions.
Playbooks for Customer Service Management	Use playbooks to provide step-by-step guidance for completing the tasks needed to resolve specific types of customer service cases.
Guided Decisions for Customer Service Management	Use guided decisions to resolve complex cases faster and more efficiently by guiding customer service agents through a structured troubleshooting process.
Estimated time to resolve a case	Use machine learning to predict the estimated time to resolve a case (ETTR) based on case attributes such as the short description, category, priority, and assignment group.

CRM Workspace interface

The CRM Workspace interface provides agents with the tools and information they need to resolve interactions and cases.

CRM Workspace interface



Multi-tab interface

Within the CRM Workspace interface, two levels of tabs enable agents to work on multiple cases, tasks, and other customer records within a single browser window.

- Top-level tabs display case records or case type records.
- Sub-tabs display record details in addition to related records, such as case tasks, work orders, and contact or account information.

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Agents can open up to 20 tabs simultaneously in the workspace. The system automatically caches the 10 most recently used tabs for faster navigation.

Agents can use this tab configuration to quickly move between records without losing their place.

Contextual display

Agents get a complete view of a customer's history, including interactions, products, and cases. Agents can find this information throughout the CRM Workspace interface. For example:

- Record details: Provides customer or consumer information, details about the product or service, and a short description of the issue.
- Contact and consumer lookup: Displays customer information in record cards and provides quick access to details such name, email, and phone.
- Customer History: Displays customer, consumer, or account history information in the form of a filtered activity feed.
- Activity stream: Displays a running history of updates and communications within a record such as field updates, comments, work notes, and emails.
- Contextual side panel: Includes tabs that agents can use to view record information, SLA details, and attachments.
- Related lists: Show records from other tables that are linked to the current record like case tasks or work orders.

Record details

In CRM Workspace, each case or interaction record includes information about the customer or consumer, the product or service, and a short description of the issue being addressed. It can also include information about the record priority, state, and agent assignment.

Depending on the record page configuration, record details can be found in the Details tab or in a case or interaction details component. For example, the Front-line case page includes a case details component with the following collapsible sections:

- Case
- Notes
- Closure Information
- Related Records

The CSM default record page includes a Details tab as the first record sub-tab.

Contextual side panel

The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The tools available in the contextual side panel are configurable for each record page. For example, the contextual side panel in the Front-line case page includes the following tabs:

- Record information
- Recommended Actions search
- Attachments
- Form Templates
- Response Templates

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- Email Templates
- Related Lists

For more information, see CRM Workspace contextual side panel components.

Agent inbox

Agents see their assignments in their CRM Workspace inbox. Work assignments appear as cards in the inbox that agents can either choose to accept or reject. Agents can also set their status in the inbox, such as **Available** or **Busy**.

For more information about the agent inbox, see the following topics:

- Exploring Advanced Work Assignment
- Inbox layout
- Agent inbox controls

CRM Workspace landing pages

A landing page is an initial view of your workspace. Landing pages present content tailored to a user's assigned role and provide the information they must get started with their work.

Landing pages can include filtered lists, KPIs, and other features that enables you to access information from one location. CRM Workspace landing pages provide customer service agents and managers with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Agents use landing pages as a starting point to get into their work. They can use landingpages to quickly scan and prioritize cases and case tasks, access records, and track their performance.

CRM Workspace landing pages

Several landing pages are available for CRM Workspace.

CSM Landing Page and CSM Landing Page - Premium

These landing pages use components to display lists and metrics. The admin configures this information in UI Builder and can create different landing pages for different audiences.

Two versions of the landing page are available based on plugin activation. For more information, see CRM Workspace landing page plugins.

CSM Dashboards

This landing page uses dashboards to display information. You can duplicate the provided dashboards and modify them as desired or create dashboards and then share these dashboards with other users.

CRM Workspace landing page plugins

The following table describes the plugin requirements for the CRM Workspace landing pages.

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CRM Workspace landing page plugin requirements

Landing Page	Plugin requirements
CSM Landing Page	Available with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace).
CSM Landing Page - Premium	Available with the following plugins: • CRM Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics - Content Pack - Customer Service Management - Advanced (com.snc.pa.customer_service_advanced)
CSM Dashboards	Available with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace).

CSM Landing Page

The CSM Landing Page provides users with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Customer service agents and managers can use the CSM Landing Page to quickly scan and prioritize work, access records, and track performance. Administrators can customize landing pages in UI Builder to meet their unique business needs.

The CSM Landing Page includes components that display case information, plus visualizations that further break down the component data. Each of the visualizations is connected to a data source. For example, the **High priority cases** component includes visualizations for P1 and escalated cases, plus cases that need attention.

Note: To ensure the High priority cases component filters correctly, install the Customer Service Case Action Status (com.snc.csm_action_status) plugin. This plugin adds the missing **action_status** field, which isn't included with the CSM plugin by default. Also, ensure your instance is on Xanadu Patch 7 or later.

The CSM Landing Page is available with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace). This landing page is the default landing page for CRM Workspace.

Note: Upgrade customers who haven’t customized the existing CRM Workspace landing page are automatically upgraded to the landing page available with the Brazil release. Upgrade customers who have customized the existing CRM Workspace landing page must manually accept the Brazil landing page.

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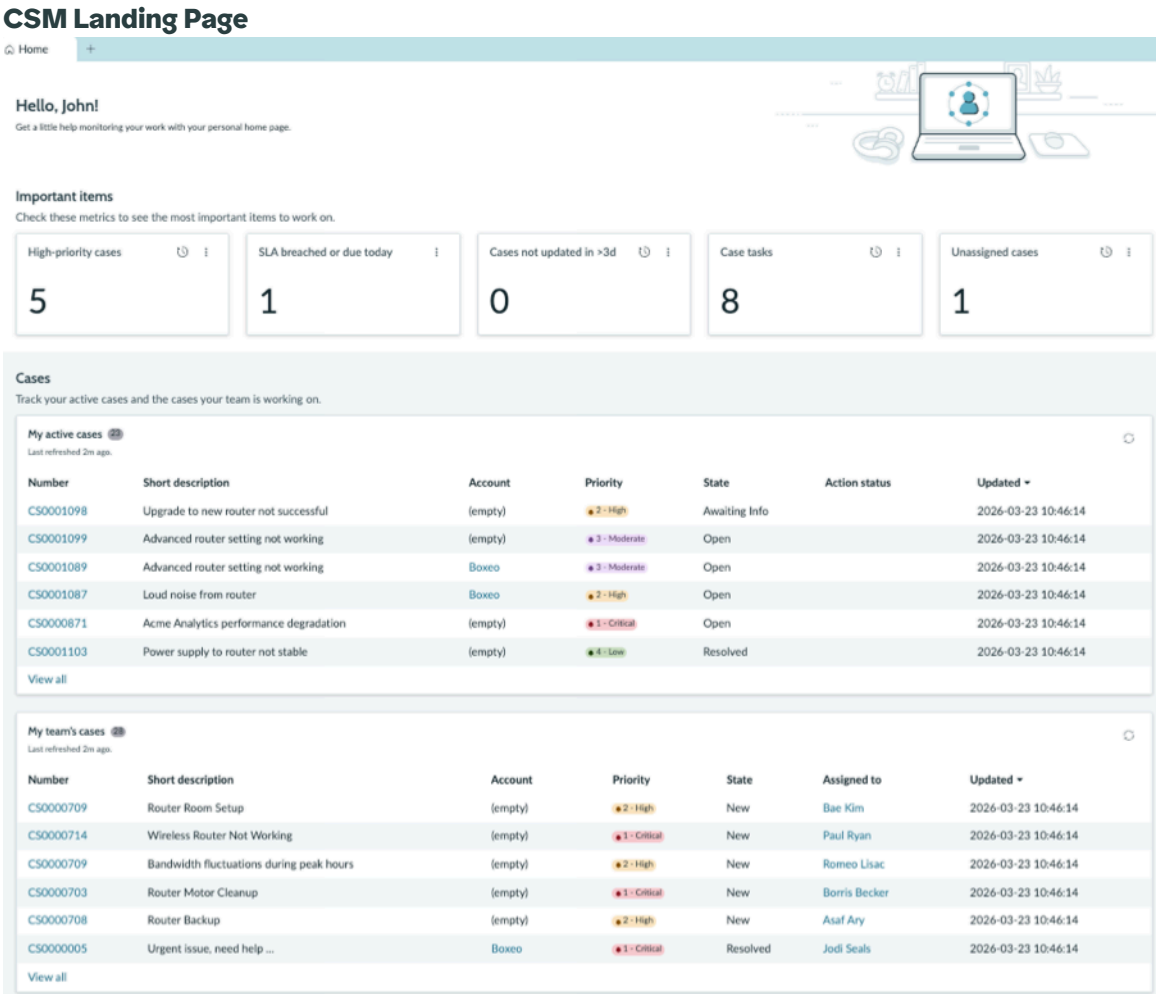

CSM Landing Page sections and components

The CSM Landing Page includes different sections and components that display important items, record lists, and performance data.

CSM Landing Page and CSM Landing Page - Premium sections and components

Section	Description
Important Items	This section includes single score cards that display an agent's most important items to work on. • **High priority cases**: Includes P1 cases, escalated cases, and cases that need attention. • **SLA breached or due today** • **Cases not updated in >3d** • **Case tasks** • **Unassigned cases**: Cases that are unassigned and belong to one of the agent's assignment groups. Selecting a score card displays a list of records with the appropriate filter conditions.
Cases	This section includes two lists of records:

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CSM Landing Page and CSM Landing Page - Premium sections and components (continued)

Section	Description
	• **My active cases** • **My team's cases** Selecting a case number opens a new tab and displays the case record.
Performance	This section includes indicators that track the agent's performance. • **Met SLA (last 7 days)** • **Reopened cases (last 30 days)** The following indicators are available in the Performance section with activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin: • **CSAT**: Customer satisfaction score based on cases assigned to the agent for the last 7 days. • **Response time** • **Resolution time** Select an indicator to display either a filtered list of records or a KPI details page.

Create a landing page for CRM Workspace

Use UI Builder to create landing pages for your agents. For more information, see Create a CRM Workspace landing page.

Create multiple landing pages

You can create multiple landing pages. However, only a single landing page is displayed for a user. The landing page that is displayed depends on the following settings:

- The setting of the **Active** field. This field must be set to true for a landing page to be displayed.
- The **Order** of the landing page. Pages with a lower-order value take precedence over pages with a higher-order value. The active page with the lowest order number is displayed.
- If permissions are defined, users can see a landing page if they have the required role or are a member of the required assignment group. Multiple roles and assignment group conditions are treated as OR conditions.

CSM Landing Page - Premium

The CSM Landing Page - Premium provides users with lists of assigned cases and case tasks as well as agent, group, and organization metrics.

Customer service agents and managers can use the CSM Landing Page - Premium to quickly scan and prioritize work, access records, and track performance. Administrators can customize landing pages in UI Builder to meet their unique business needs.

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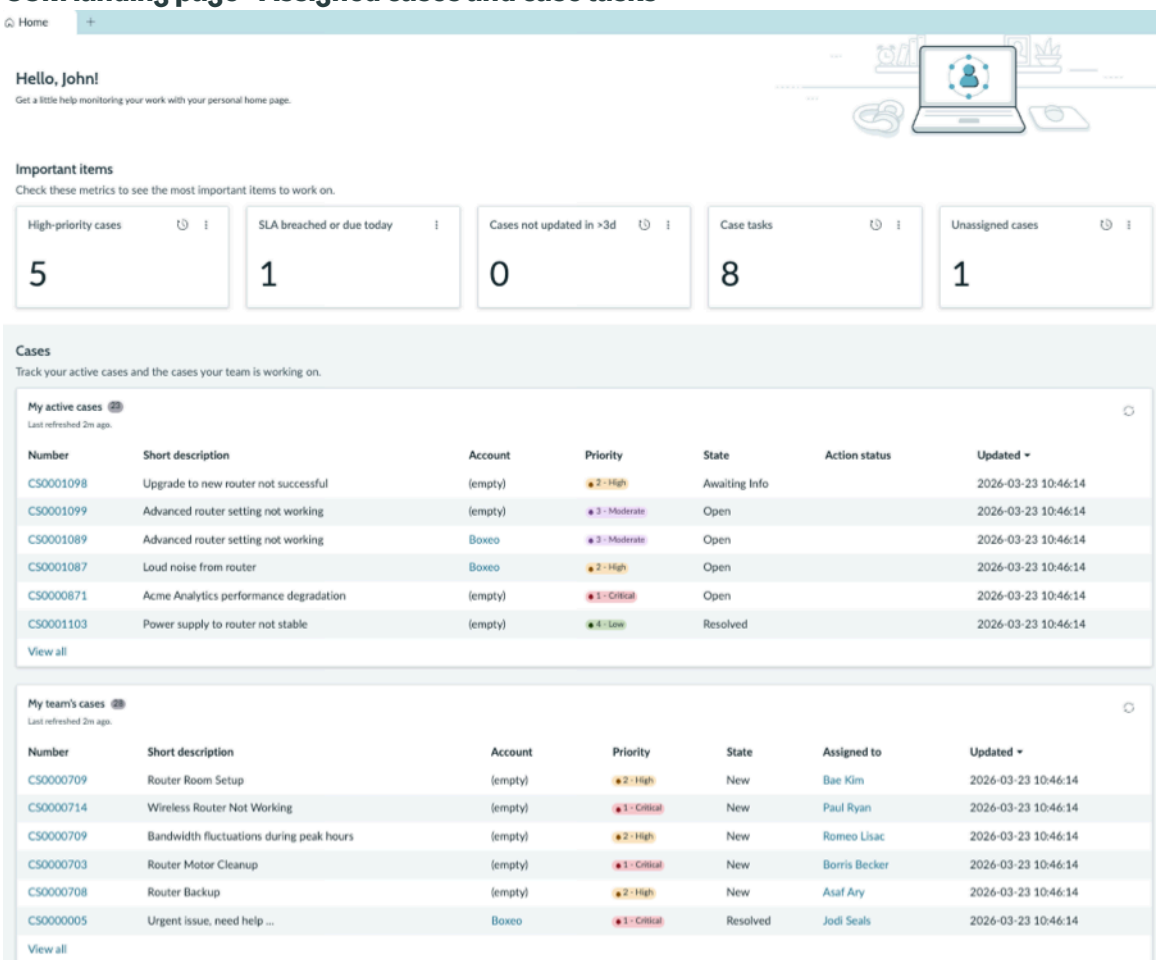
The CSM Landing Page - Premium includes components that display case information, plus visualizations that further break down the component data. For example, the **High priority cases** component includes visualizations for P1 and escalated cases, plus cases that need attention. It also includes additional indicators and visualizations in the **Performance** and **Organization's Performance** sections. Each of the visualizations is connected to a data source.

The CSM Landing Page - Premium is available with the following plugins:

- CRM Workspace (com.snc.uib.csm_agent_workspace)
- Performance Analytics - Content Pack - Customer Service Management - Advanced (com.snc.pa.customer_service_advanced)

Note: Upgrade customers who haven't customized the existing CRM Workspace landing page are automatically upgraded to the landing page available with the Brazil release. Upgrade customers who have customized the existing CRM Workspace landing page must manually accept the Brazil landing page.

CSM landing page - Assigned cases and case tasks



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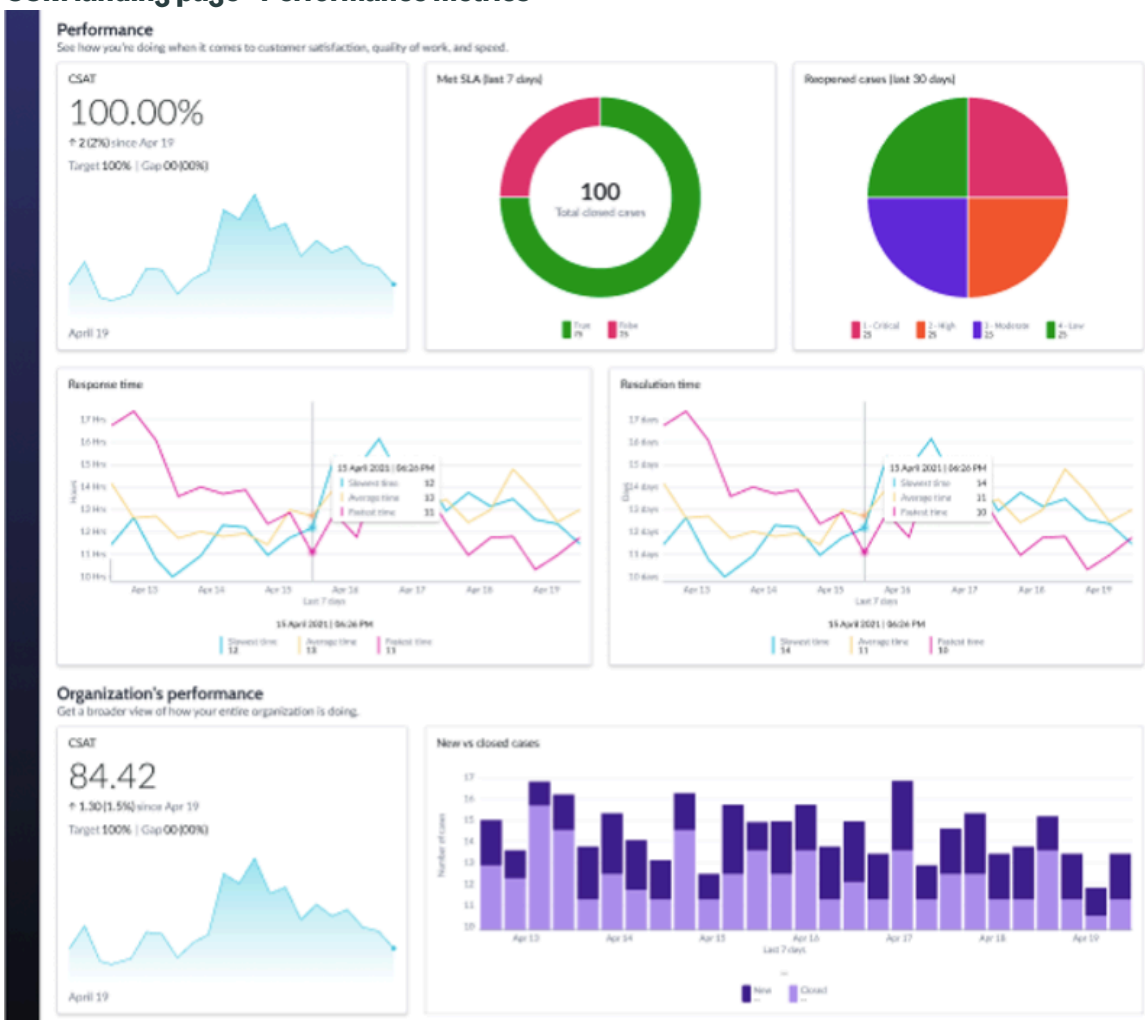
CSM landing page - Performance metrics



CSM Landing Page - Premium sections and components

The CSM Landing Page includes different sections and components that display important items, record lists, and performance data.

CSM Landing Page and CSM Landing Page - Premium sections and components

Section	Description
Important Items	This section includes single score cards that display an agent's most important items to work on. • **High priority cases**: Includes P1 cases, escalated cases, and cases that need attention. • **SLA breached or due today** • **Cases not updated in >3d** • **Case tasks** • **Unassigned cases**: Cases that are unassigned and belong to one of the agent's assignment groups. Selecting a score card displays a list of records with the appropriate filter conditions.

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CSM Landing Page and CSM Landing Page - Premium sections and components (continued)

Section	Description
Cases	This section includes two lists of records: • **My active cases** • **My team's cases** Selecting a case number opens a new tab and displays the case record.
Performance	This section includes indicators that track the agent's performance. • **Met SLA (last 7 days)** • **Reopened cases (last 30 days)** The following indicators are available in the Performance section with activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin: • **CSAT**: Customer satisfaction score based on cases assigned to the agent for the last 7 days. • **Response time** • **Resolution time** Select an indicator to display either a filtered list of records or a KPI details page.
Organization's Performance	This section includes indicators that track the organization's performance. • **CSAT**: Customer satisfaction score for the last 7 days. • **New vs closed cases**: Daily aggregation of new and closed cases for the last 7 days. Select an indicator to view a KPI details page. **Note:** This section is available for the CSM Landing Page - Premium, which requires activation of the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin.

Create a landing page for CRM Workspace

Use UI Builder to create landing pages for your agents. For more information, see Create a CRM Workspace landing page.

Create multiple landing pages

You can create multiple landing pages. However, only a single landing page is displayed for a user. The landing page that is displayed for you depends on the following settings:

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- The setting of the **Active** field. This field must be set to true for a landing page to be displayed.
- The **Order** of the landing page. Pages with a lower-order value take precedence over pages with a higher-order value.
- If permissions are defined, you can see a landing page if you have the required role or are a member of the required assignment group. Multiple roles and assignment group conditions are treated as OR conditions.

Dashboard landing pages

Enable your users to display, customize, and share dashboards in CRM Workspace and use these dashboards as landing pages.

Workspace dashboards enable users such as agents and managers to configure and customize their own metrics. These users can switch between available dashboards and modify dashboard lists and metrics to track important information. They can also share dashboards with coworkers and across teams.

To display workspace dashboards, system administrators activate the CSM Dashboards landing page variant and configure user privileges. When configured, users included in the page audience see the Dashboard Overview landing page in CRM Workspace and the default dashboards included with that page.

The dashboards are represented by tiles on the Dashboard Overview landing page. The individual tiles show the title, the creator, whether the dashboard is certified, and an indication that the logged in user has bookmarked the dashboard.

Benefits of dashboard landing pages

Using a dashboard as a landing page gives your users more flexibility. Being able to easily customize a dashboard makes the page much more usable. Users can create their own lists and metrics to display the information they need and then share these dashboards with other users. As an example, teams can share a single dashboard or new agents can modify a shared dashboard to create their own. It is much faster to create dashboards because they do not require configuration by a system administrator.

Application information

The CSM Dashboards landing page variant is available with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace).

The CRM Workspace application is available from the ServiceNow® Store.

The default dashboards available with this landing page variant are available depending on user role. Some of these dashboards require additional plugins to see all of the dashboard information. These plugins include:

- Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service)
- Performance Analytics – Content Pack – Customer Service Management – Advanced (com.snc.pa.customer_service_advanced)
- Performance Analytics Premium for Customer Service (com.snc.pa.premium.cs)
- Performance Analytics - Content Pack – Advanced Work Assignment (com.snc.pa.awa)

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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.

Activating the CSM Dashboards landing page variant

The **CSM Dashboards** landing page variant is an optional page variant for the CRM Workspace experience. By default, this page variant is marked as inactive and has an order value of 0. When activated and set to the lowest order number, the system uses the **CSM Dashboards** landing page in place of the default CSM Landing Page for the users included in the page audience.

Note: The default landing page, Dashboard Overview, and the default dashboards included with that page are available in read-only mode and are provided as examples. It is recommended that you create and customize duplicates of the landing page and dashboards.

For more information about activating a page variant and setting the order, see Set record page order.

User roles for the Dashboard Overview landing page

By default, the Dashboard Overview landing page is available to users with the following roles:

- admin
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice_manager

Note: Users with other roles, such as location agents or relationship agents, continue to see the **CSM Landing Page**.

The system administrator can change these default roles by configuring the page audience. For more information, see the following topics:

- Learn about audiences
- Add an audience to your UI Builder page

Roles determine view access for the dashboards available with the Dashboard Overview landing page. For details, see Default dashboards.

The service management agent role (sn_esm_agent) contains the data visualizations creator role (viz_creator), which is a role associated with the Visualization Designer and Visualization Library. Users with the viz_creator role can create visualizations. The customer service agent (sn_customerservice_agent) and consumer service agent (sn_customerservice.consumer_agent) roles contain the sn_esm_agent role. For more information, see Data visualizations in Platform Analytics.

Dashboard Overview landing page default dashboards

Four dashboards are available with the Dashboard Overview landing page. These dashboards are available in read-only mode for all users, including the admin role. Users can duplicate these dashboards and make the desired changes to the duplicate dashboards.

Note: These dashboards are also available from Platform Analytics experience.

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The Dashboard Overview landing page includes the following dashboards for agents.

- Customer Service Agent
- Customer Service Agent – Advanced

The Dashboard Overview landing page includes the following dashboards for managers and admins.

- Customer Service Agent
- Customer Service Agent – Advanced
- Customer Service Manager
- Customer Service Manager – Advanced

CRM Workspace landing page dashboards

Landing page	Details
Customer Service Agent	Available with the CRM Workspace (com.snc.uib.csm_agent_workspace) plugin. By default, the Customer Service Agent dashboard includes the widgets on the **My Work** tab. **Note:** The tab is not visible because it is the only tab on the dashboard. Activating the Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) plugin provides the complete Customer Service Agent dashboard with all tabs.
Customer Service Agent - Advanced	Available with the following plugins: • CRM Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics – Content Pack – Customer Service Management – Advanced (com.snc.pa.customer_service_advanced) Activating the Performance Analytics - Content Pack – Advanced Work Assignment (com.snc.pa.awa) plugin adds two additional widgets to the Organizational Trends tab: • My Cases with Problems • My KBs Created
Customer Service Manager	Available with the following plugins: • CRM Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) Activating the Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) plugin

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CRM Workspace landing page dashboards (continued)

Landing page	Details
	provides the complete Customer Service Manager dashboard with all tabs.
Customer Service Manager - Advanced	Available with the following plugins: • CRM Workspace (com.snc.uib.csm_agent_workspace) • Performance Analytics – Content Pack – Customer Service Management – Advanced (com.snc.pa.customer_service_advanced) Activating the Performance Analytics - Content Pack – Advanced Work Assignment (com.snc.pa.awa) plugin adds the Work Assignment Analytics tab to the Customer Service Manager - Advanced dashboard.

Certifying a dashboard

Users with the admin role can certify a dashboard to indicate that it is company-approved and recommended for use. The default dashboards available from the Dashboard Overview landing page are certified and admins cannot change this setting. Admins can only certify new dashboards. For more information, see Certify a Platform Analytics dashboard.

Working with dashboards

Agents can create their own dashboards and share those dashboards with other agents or assignment groups. For example, agents can create dashboards with metrics and lists that support specific assignments, such as a temporary weekend assignment.

From the Dashboard Overview landing page, managers and agents can do the following:

- View the default dashboards available for their role.
- Filter the available dashboards.
- Select a dashboard tile to display the dashboard in a new tab. If more than one dashboard is available, the user can switch between the available dashboards by making a selection from the dashboard picker.
- Duplicate and customize the default dashboards.
- View dashboard details such as the dashboard name, description, and visibility.
- Edit dashboards using a configuration panel.
- Share dashboards with other users or groups and grant edit or view-only rights.
- Create new dashboards.
- Create and share visualization elements from the Platform Analytics Workspace.

See the task descriptions in the following table for more information.

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Dashboard landing page user tasks

Task	Description
View the default dashboards available for your role	**1.** Select **Workspaces** > **CRM Workspace**. The Dashboard Overview landing page displays the available dashboards. **2.** Select a dashboard tile to display the dashboard in a new tab.
View dashboard details	Select a dashboard to open the Details panel.
Filter dashboards	Several filter options are available on the Dashboard Overview landing page. Users can filter the available dashboards in the following ways: • By name or owner (in the search bar) • Recent: shows recently created dashboards • Bookmarked: shows only your bookmarked dashboards. • Certified: shows only the dashboards that have been certified by an administrator. • Created by me: shows only the dashboards that you have created. • Shared with me: shows only the dashboards that have been shared with you. • All: shows all dashboards that you have access to.
Duplicate a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Duplicate**. **3.** In the Duplicating dashboard pop-up window, enter a **New name** and a **Description**. **4.** Select **Duplicate** on the pop-up window. **5.** To access the duplicated dashboard: ○ Select **Open it** in the information message. ○ Select the dashboard tile on the Dashboard Overview landing page. For more information, see Duplicate a Platform Analytics dashboard .
Edit a dashboard	**1.** Select **Edit**. **2.** Select the desired dashboard tab. **3.** Edit an existing element or add a new element. For more information about these tasks, see Edit Platform Analytics dashboards .

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Dashboard landing page user tasks (continued)

Task	Description
Share a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Share**. **3.** In the Share Dashboard pop-up window, add users, groups, or roles in the **Grant access to** field. **4.** If desired, enable the check box that enables permissions for the dashboard. **5.** Select either **Add as viewer** or **Add as editor**. **6.** The selected users, groups, or roles are added to the Manage Access section. From here, you can change the permissions. **7.** Click **Confirm**. For more information, see Share a Platform Analytics dashboard.
Create a dashboard	**1.** From the Dashboard Overview landing page, select **Create new dashboard**. **2.** From the New dashboard pop-up window, select **In-line editor**. **3.** Provide a **Name** and a **Description** and select **Create new dashboard**. The new dashboard opens in the editing mode. **4.** Add new elements to the dashboard. For more information about this step, see see Create a dashboard with the in-line editor. When you create a dashboard with the in-line editor, several elements are available to help you organize and populate the information on your dashboard. For more information, see Exploring Platform Analytics dashboards.
Print a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Printer friendly**. For more information, see Print a Platform Analytics dashboard.
Bookmark a dashboard	**1.** Select the More actions menu ( ). **2.** Select **Add to bookmarks**. For more information, see Bookmark a Platform Analytics dashboard.

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Customer Service Workspace list views

The CRM Workspace list views provide filtered lists of cases, interactions, and other records such as accounts and contacts. Agents can also create and save their own lists.

A list displays records from a database table. Each list includes rows and columns of data. Each row is a record in a table and each column is a field from the record. CRM Workspace uses list pages to display list information such as cases and case tasks. These pages help agents navigate, filter, and manage records.

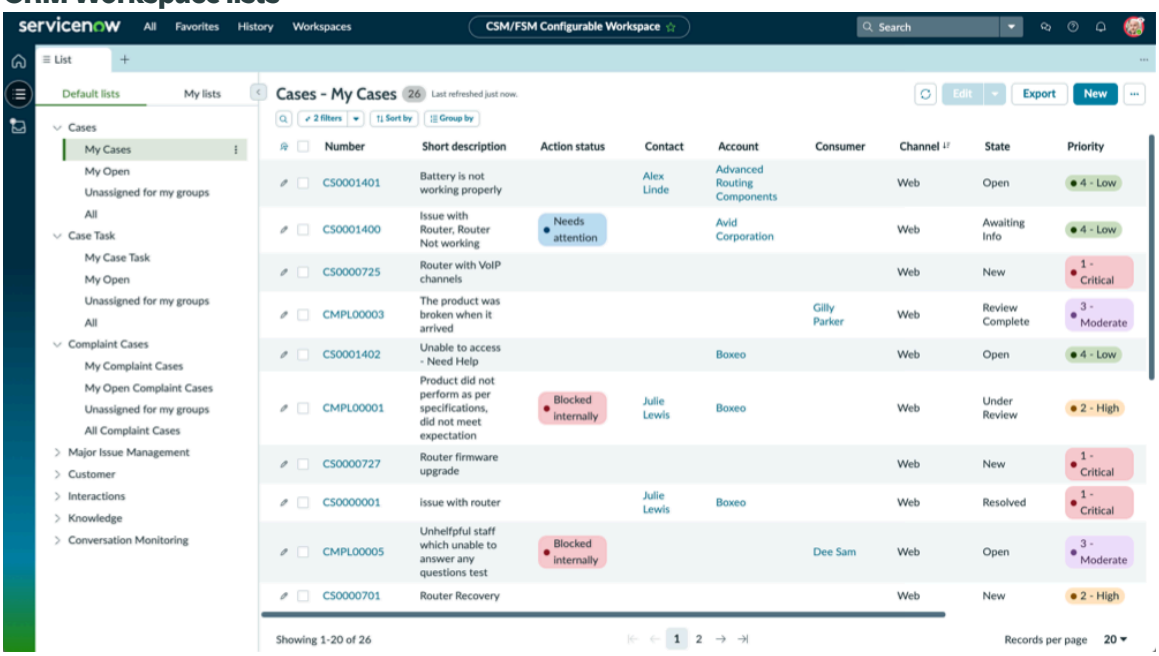
CRM Workspace presents the Core UI lists and forms in one interface and consolidates multiple tabs into a single, focused work area. From this single view, agents can:

- Work on multiple issues concurrently in an intuitive layout, reducing context and tab switching.
- Resolve issues faster with automated suggestions powered by machine learning.
- Get notified of potential major incidents based on issue frequency and impact.
- Keep informed of updates and surface important insights with a live activity feed and analytics.

List pages in CRM Workspace

List pages for CRM Workspace are created with the List page template in UI Builder. The List page template includes the Record List component bundle and List menu component.

CRM Workspace lists



Record List component bundle

The Record List component bundle includes the following components:

- Record List Header: Shows contextual information about the list.
- Presentational List: Displays the list of records from any data source in a tabular format.

The Record List component bundle is configured by admins in UI Builder. For more information, see Record list UIB Setup.

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List menu component

The List menu component displays all available and saved lists for the selected source. It's not included in the Record List component bundle itself but exists within a list page.

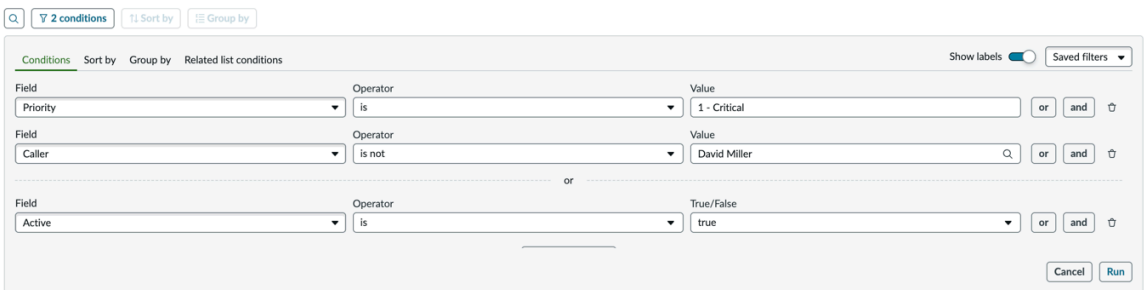
The List menu component includes the following tabs:

- Default lists: This tab displays all available lists based on the selected source. These lists gives agents quick access to relevant records.
- My lists: This tab enables agents to access their saved lists that help streamline repeat workflows. They can also create their own lists from an existing list or by selecting a new source.

The List menu component is configured by admins in UI Builder. For information on List menu component configurations, see List menu UIB Setup.

Predicate Builder

The Predicate Builder component enables agents to set conditions from the list header to filter which records appear in a list.



The Predicate Builder is configured by admins in UI Builder. For more information, see Predicate Builder UIB Setup.

Open multiple lists in workspace tabs

Agents can open a list in a new workspace primary tab from the list menu by using **Cmd/Ctrl + click**, or by selecting **Open in new session tab** from the list menu or right-click context menu.

For example, an agent may have the Open Cases list open and receive a link to a filtered list for an escalated customer. The agent can open the filtered list in a separate tab and switch between both lists without losing their place. The tab label displays the list name for easy identification.

Additional information

For more information about working with lists, see the following topics in the Configurable Workspace UI documentation:

- Administering lists for Configurable Workspace
- Using lists in Configurable Workspace

CRM Workspace form features

Use features available on CRM Workspace forms to view fields with unsaved changes, edit the text in the record header field, and view special handling notes.

For more information about working with forms, see the following topics in the Configurable Workspace UI documentation:

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- Administering forms for Configurable Workspace
- Using forms in Configurable Workspace

Visual field indicators for unsaved changes

Use visual indicators in CRM Workspace such as icons and background colors to indicate form fields with unsaved changes. When this feature is enabled, customer service agents see the following indicators:

- Dot icons appear next to the field labels for updated fields.
- Background colors change for updated fields.
- Tooltips identify each updated field.

Field updates include manual changes made by the agent, by the application of a template, or automatic updates made by AI. These visual indicators are removed when the agent saves the form.

This feature is available for the following CRM Workspace record pages:

- Front-line case page
- CSM default record page
- Email interaction record page
- CSM voice interaction record page
- CSM Interaction record page
- CSM centered chat interaction record page

Users with the administrator role can enable the background colors along with a dot icon to indicate fields with unsaved changes. The workspace-level property *`enableBgColorForUnsavedFieldIndicator`* controls these indicators. This property is set to true by default.

To set this property:

1. Navigate to **All** > **Now Experience Framework** > **Experience**.
2. Select **CRM Workspace**.
3. In the UX Page Properties related list, select *`enableBgColorForUnsavedFieldIndicator`*.
4. Update the value in the **Value** field.
5. Select **Update**.

Editable record headers

Customer service agents can edit the short description (primary field) of a record directly from the record header field. To edit the text, simply select the record header field and make the changes.

This feature is available on the following CRM Workspace record pages:

- Front-line case page
- CSM Interaction record page
- CSM default record page
- CSM voice interaction record page

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- CSM centered chat interaction record page
- Email Interaction record page

The editable record header feature includes the following benefits:

- The system validates the text entered in the record header field.
- The **Short description** field (primary field) automatically updates with the changes made in the record header field.
- Changes to the record header field are saved when the agent saves the record.
- Empty record header fields display placeholder text. For example, default placeholder text such as **Enter short description here** is displayed for new record forms.
- The text in the record header field is truncated if it is longer than the field width. Hovering over the field displays the full text.
- Editing permissions for the record header field are restricted to authorized agent roles.

Note: The record header is not editable if the form field used as the record header is either read-only or not present on the form.

Suggestions for using the editable record header feature:

- Use only static text fields such as **Short description** or **Subject** as the editable record header field.
- Do not re-use the placeholder text as the value in the record header field as the placeholder text indicates that the field is empty.

  Note: If the placeholder text is used as the value in the record header field, the agent must double-click the record header field to change the text.

Field label positions

The labels for form fields can appear either above the field or next to the field. The UI Builder configuration property **Label value layout** controls the position of the form fields. This property has the following options:

- Stacked: Labels appear on top of the fields.
- Tabbed: Labels appear next to the fields.

This property is available for the following CRM Workspace record pages:

- Front-line case page
- CSM default record page
- Email interaction record page
- CSM voice interaction record page
- CSM Interaction record page
- CSM centered chat interaction record page

Special handling notes

Special handling notes bring important information about individual records to the attention of the customer service agent. If special handling notes are available for a record, these notes are displayed in a pop-up window when the record is opened in a CSM workspace. Notes can also

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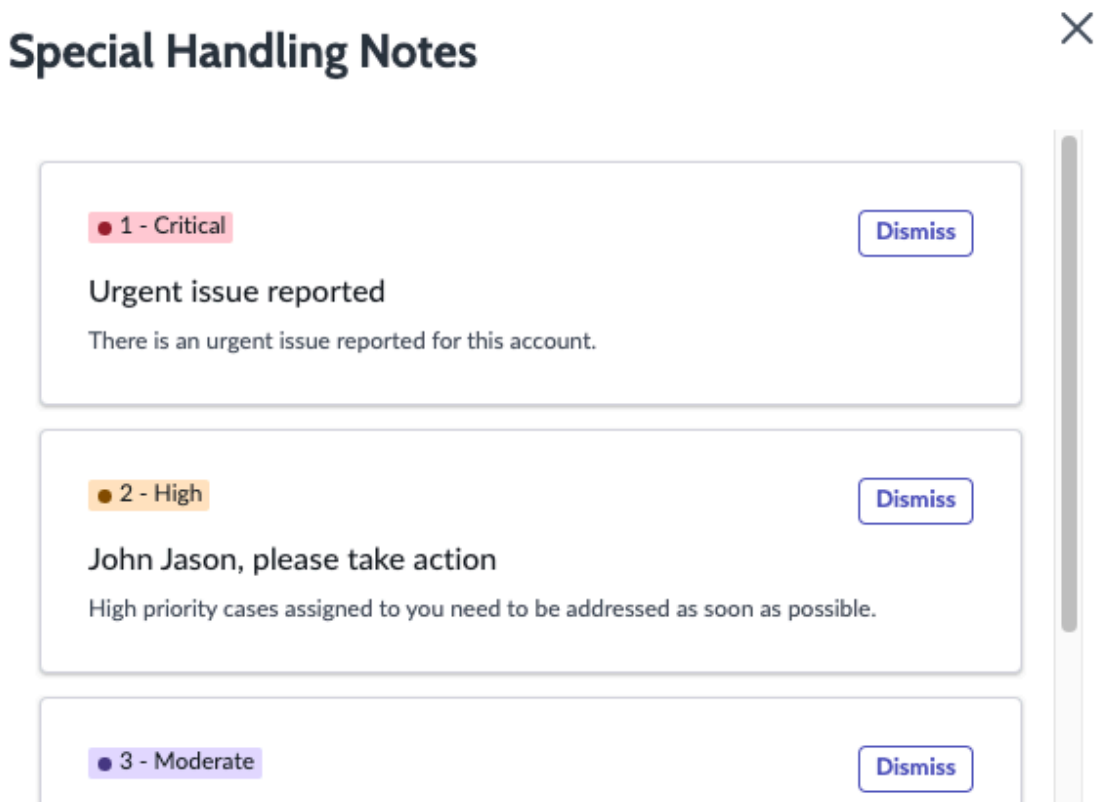
be displayed in an embedded list or a related list on a record form. Notes are ordered by priority in the pop-up window and in lists.

Agents can see the priority, short description, and message for each note. A note can be assigned one of the following priorities, which also have associated colors.

- Priority 1 — red
- Priority 2 — orange
- Priority 3 — purple
- Priority 4 — gray

Special handling notes pop-up window



Agents can:

- Dismiss individual notes. When all notes are dismissed, the pop-up window closes.
- Close the window.

In the Special Handling Notes module on the platform interface:

- Users with the sn_shn.admin role can configure special handling notes and specify properties.
- Users with the sn_shn.admin or sn_customerservice_manager roles can create special handling notes.

For more information about configuring the special handling notes feature, see Special handling notes overview.

Agent actions

Actions available to customer service agents appear in the form header as buttons or menu items.

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For CRM Workspace, you can link UI actions to form actions. For more information, see Set up a form action in CRM Workspace.

The **Create Knowledge** action requires the following setup:

- Activate the Knowledge Management Advanced Installer plugin (com.snc.knowledge_advanced.installer).
- Set the **sn_customerservice.enable_knowledge_kcs** property to true.
- Set the KCS Article template to true (navigate to **Knowledge** > **Administration** > **Article Templates**).

Agent assist

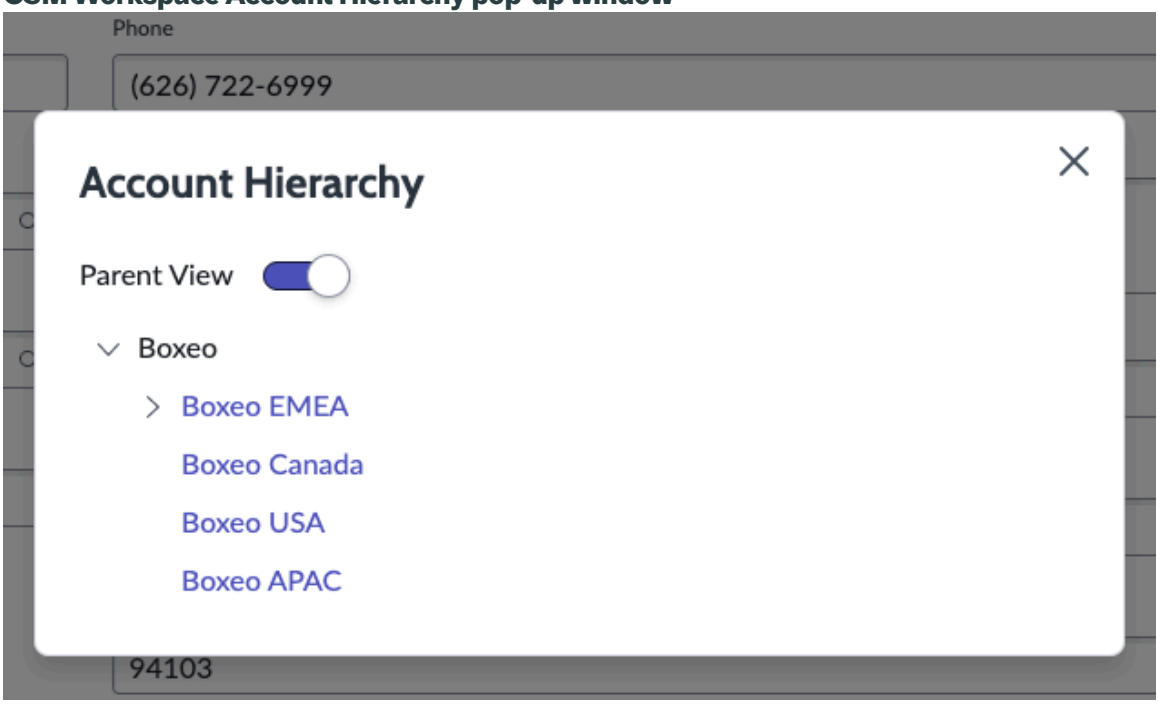
Agent assist is available on the Interaction form in CRM Workspace. Users with the customer service agent role (sn_customerservice_agent) can use Agent assist to search for information from an interaction. By default, the available search sources include Knowledge articles, Service Catalog, and ServiceNow Community blogs and posts.

For more information on how to enable Recommended Actions - AI search and disable Agent Assist, see Enable AI search in Recommended Actions.

Account hierarchy

From the Account form, customer service agents can select the open hierarchy icon ( ) in the **Name** field to see the parent-child account relationships in the Account Hierarchy pop-up window. The account hierarchy is available for accounts that have a parent or child account.

CSM Workspace Account Hierarchy pop-up window



The account hierarchy uses a tree structure to show the parent, child, and sibling accounts. The parent view displays the current account, the parent account (if applicable), and any child or sibling accounts. The full view displays the entire structure of the organization from the root account. The current account is highlighted in the account structure.

Customer service agents can:

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- Expand and collapse the tree structure.
- Switch between the parent view and the full view of the account hierarchy.
- Select an account to open the Account form in a sub tab.

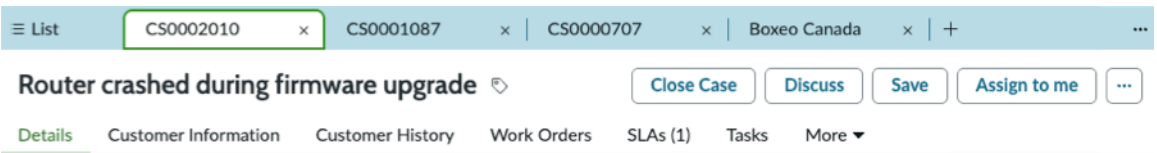
For information about creating an account hierarchy, see Account hierarchy.

CRM Workspace form headers

Form headers in CRM Workspace provide agents with a brief description of the case.

Form headers typically include the case short description. They can also include the action bar, record tags, and the record presence component.

Case form header



For more information, see Set up a form header in CRM Workspace

Note: One form header configuration, **CRM Workspace Header Config**, is included with CRM Workspace.

Record Information tab

The record information tab in the contextual side panel displays record details including the account and contact or consumer, the case state, and the case priority.

The Record Information tab in the contextual side panel can include the following cards depending on the record page configuration:

- Overview: Displays relevant information about the case including the account and contact, the case priority, and the state.
- Active SLA: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches.

The cards that appear in the Record Information tab can be configured in the ribbon configuration. For more information, see Set up a ribbon configuration in CRM Workspace.

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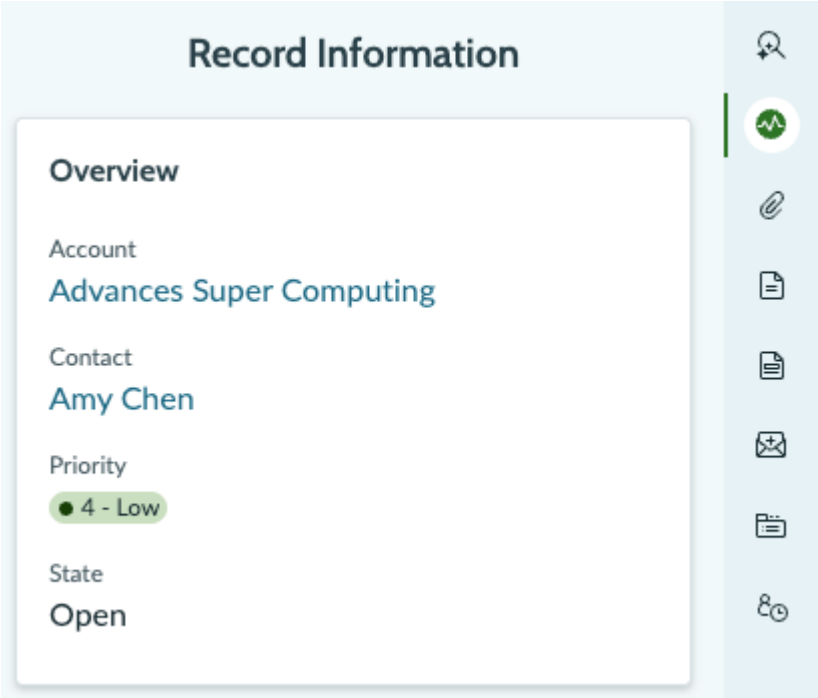
Overview card in the Record Information tab



Form header components

For CRM Workspace, the form header is made up of individual components that can be configured with UI Builder.

Individual components provide customers with flexible and granular configuration options. Customers can control the placement, size and spacing of these components, giving them the ability to show additional information that agents may need.

The Data Value Block component is used to display secondary values in the form header and the Contextual side panel.

CRM Workspace form ribbon and components

The form ribbon provides includes components that display relevant information about a case and provide agents with a quick overview of the case details. These components can include a contact or consumer summary, a timeline, and SLA details.

Agents can use links in the ribbon components to place phone calls or create email messages. Agents can also show or hide the ribbon as needed by clicking a button at the top of the ribbon.

Customer Service Management ribbon components

For Customer Service Management, you can configure the ribbon for the Case form to include one or more of the available ribbon components:

- Customer 360
- Timeline
- Active SLAs
- Time to resolve component

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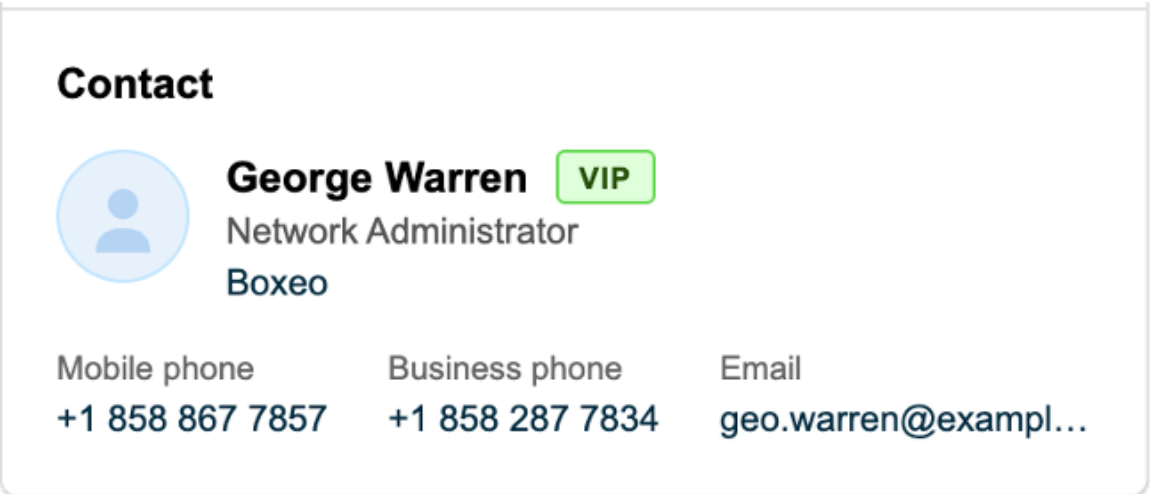
Customer 360 ribbon component

The Customer 360 component displays customer information such as the contact or consumer name, email address, and phone numbers.

Customer 360 ribbon component



You can configure the Customer 360 component to display different fields, such as the fields described in the following table.

Field	Description
Header	The header includes customer information. • For B2B customers: Displays either the **Primary Contact** or **Contact**. • For B2C customers: Displays the **Consumer**. • For internal contacts with the proxy contact role (sn_csm_proxy_cont): Displays the **Internal contact**. **Note:** Requires the Customer Proxy Contacts (com.snc.csm_proxy_contacts) plugin.
Avatar	A graphic representation of the customer's identity, such as an image or icon.
Name	The customer's name.
Title	The customer's title.
Account	For B2B customers, the account associated with the contact.
Phone numbers	• For contacts: **Mobile phone** and **Business phone** • For consumers: **Mobile phone** and **Home phone**
Email address	The customer's email address.

The Customer 360 component supports dot walking on selected reference tables. You can display fields from these tables:

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- User [sys_user]
- Contact [customer_contact]
- Consumer [csm_consumer]

If you configure the Customer 360 component to display information from a dot-walked field, the label for that field shows the `Column` name instead of the `Table.Column` name.

Note: For B2B customers, the Customer 360 component can also include colored tags that indicate Very Important Person (VIP) accounts and escalated accounts.

From the Customer 360 component, agents can perform the following actions.

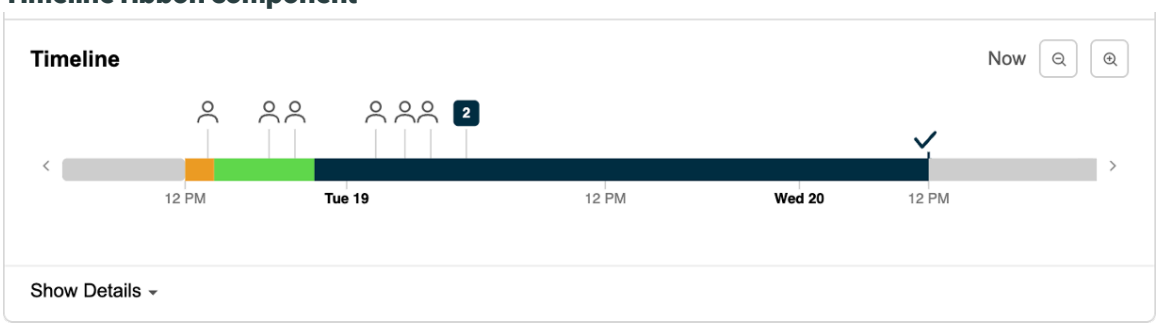
Action	Description
Email a contact or consumer	Agents click the address in the **Email** field to send an email to the contact or consumer. This action opens a new email in the email editor with the following fields auto-populated: • **To**: the contact or consumer email address • **Subject**: the case number and short description
Call a contact or consumer	If phone integration is enabled, agents click a number in one of the phone number fields to call the contact or consumer. The OpenFrame window displays information about the contact or consumer name and the account.
View the account record	Agents click the **Account** link to open the account record.

Timeline ribbon component

The timeline component displays a chronological summary of case activities, including case state changes and interactions between the agent and the requester (typically the customer). It also shows how much time that the fulfiller and requester spent on the case.

Note: The workspace administrator can select the agent role when configuring the timeline component attributes.

Timeline ribbon component



The timeline uses icons to display events and colors to show ranges of time, such as when the case is with the agent or the customer. Agents can point to event icons in the timeline to display tooltips with additional information.

Note: The timeline component uses the resolution shaper configuration for the selected entity table, for example, the Case table.

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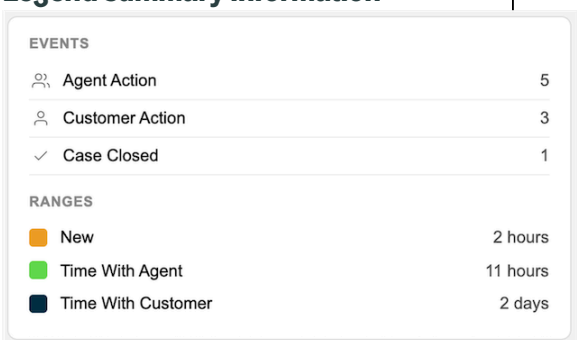
The timeline includes the following features:

Timeline features

Timeline feature	Description
Global start and end dates	The global start date is the date that the case was created. The global end date is the date that the case was closed.
Start and end dates	The start and end dates that identify a specific window of time on the timeline. The default window is one week. • The default end date is the current date. • The default start date is the current date minus 7 days.
Header	A configurable title for the timeline. With the system administrator role, you can add a title in the **Name** field on the Ribbon Setting form.
Legend	Click **Show Details** to display event and range summary information. **Legend summary information** 
Events	Events are represented on the timeline using icons. Each type of event has a corresponding unique icon. The time that an event occurred is also captured so that events are displayed on the timeline in chronological order.
Grouped events	Events that occur close together can be grouped and represented using a group icon. When events are grouped, the timeline displays a badge icon with the number of events in the group.
Event summaries	Event summaries appear in the timeline legend. Each summary lists the event and the number of times it occurred. **Note:** An event summary includes occurrences of the event over the life of the object visualized on the timeline.

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Timeline features (continued)

Timeline feature	Description
Time ranges	Time ranges are represented on the timeline using colors. Each range has a corresponding unique color and a start and end time. The following default ranges include: • Green: with the agent • Blue: with the customer
Time range summaries	Time range summaries appear in the timeline legend. Each summary lists the range, the corresponding color, and the total duration. **Note:** A range summary includes occurrences of the range over the life of the object visualized on the timeline.
Tooltips	Point to event icons to display additional information.
Zoom	Zoom in on the timeline to see more details in a smaller time window or zoom out to see more events in a larger time window. • Click the zoom in or zoom out icons on the timeline. • Use the zoom in and zoom out features on the keyboard (**Ctrl** + **+** and **Ctrl** + **-**). • Use the zoom in and zoom out features on the cursor.
Pan	Pan left and right to view newer or older events. • Pan left in the timeline to view older events by clicking the left caret icon (**<**). Panning to the left stops when the timeline reaches the specified global start date. • Pan right in the timeline to view newer events by clicking the right caret icon (**>**). Panning to the right stops when the timeline reaches the specified global end date.
Reset the timeline	Click **Now** to reset the timeline to the default view after panning or zooming. The timeline resets using the time that the button was clicked as the end date and time.
Messages	The timeline displays messages for the following events:

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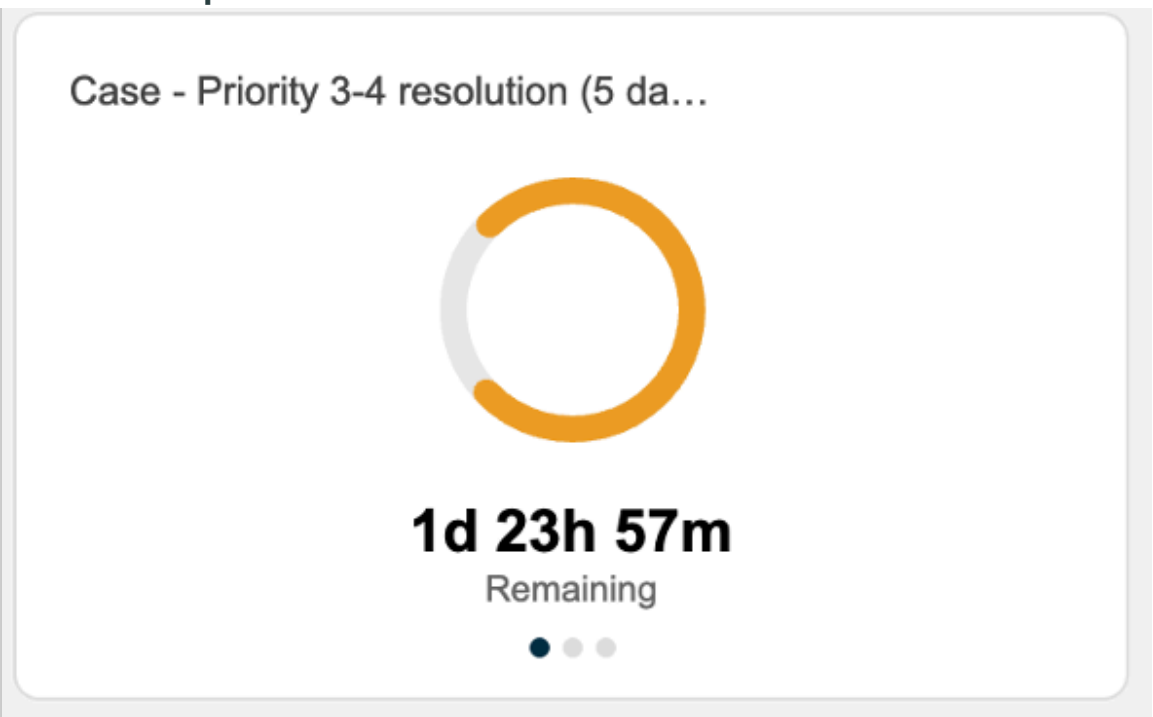
Timeline features (continued)

Timeline feature	Description
	• There is no data to be displayed. • The timeline experiences a loading error.

Active SLA component

The Active SLA component displays active SLAs for the case, including time remaining, the SLA state, and any breaches. If a case has multiple SLAs, the SLA with the most imminent deadline is shown first. Pointing to the SLA component displays left and right navigation arrows that agents can use to view the other SLAs.

SLA ribbon component



Color coding within the component indicates the time remaining for the SLA:

- Green: 0–50%
- Yellow: 50–75%
- Orange: 75–99%
- Red: 100% or breached

Time to resolve component

The time to resolve component displays the estimated time required for an agent to resolve the case.

Note: The time to resolve component requires the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Estimated time to resolve a case.

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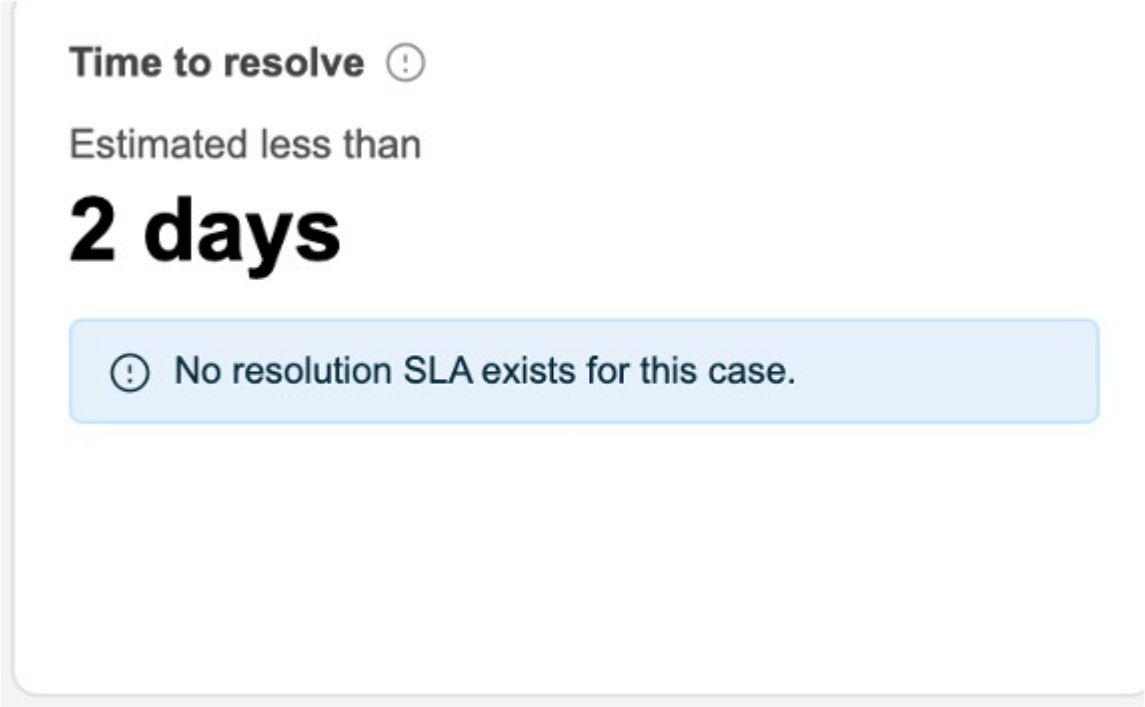
Time to resolve component



In this image, the estimated time that the agent will need to resolve the opened case is 0 to 2 days. Hence, the upper bound value is displayed. The estimated time is calculated from the time the case was created. If the range for example, is between 2 to 4 days, both the lower and upper bound values are displayed.

The **Time to resolve** component also displays the prediction for SLA breach if the case is attached to an SLA.

Following are a list of SLA messages displayed and the action required when they appear.

SLA messages	Task
No resolution SLA exists for this case	Set the value in the **Target** field to **Resolution** in the **SLA Definition** form.
Repair resolution SLA to add breach time	Click **Repair** on the Task SLA form.
Highly likely to breach resolution SLA	None
Highly unlikely to breach resolution SLA	None
Likely to breach resolution SLA	None
Unlikely to breach resolution SLA	None

Configuring ribbon components

For CRM Workspace, you can create a ribbon setting and add that setting to a ribbon configuration. For more information, see Set up a ribbon configuration in CRM Workspace.

Note: One ribbon configuration, **CRM Workspace Ribbon Config**, is included with CRM Workspace.

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You can also display the form ribbon in the form ribbon in the Contextual side panel. For more information, see Display the form ribbon and form header secondary values in the Contextual side panel.

Domain separation

Ribbon configurations in CSM workspaces support domain separation.

CRM Workspace contextual side panel components

Use the contextual side panel to quickly access tools and information directly from the record page, helping agents research and resolve customer issues without leaving the case view.

The contextual side panel is embedded within multiple record pages in CRM Workspace. The side panel contains tabs with different functionality that vary depending on the record page. While the content within the side panel may be similar from one record page to another, the order and availability of the tabs may vary.

Contextual side panel tabs

Tab	Description
Record Information	The Record Information tab includes the following cards: • Overview: Displays relevant information about the case including the account and contact, the case priority, and the state. • Active SLA: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches. The cards that appear in the Record Information tab can be configured in the Front-line Case Page Ribbon Config ribbon configuration. For more information, see Set up a ribbon configuration in CRM Workspace
Recommended Actions	The Recommended Actions tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can do the following: • Select a source to see search results of that type. • Filter the list of search results. • Sort the list of search results. • Open the search results in full view in a record sub-tab. Agents can take the following actions:

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Contextual side panel tabs (continued)

Tab	Description
	• View and attach an article. • Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful. • View successful actions by selecting the Actions history icon. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.
Response Templates	The Response Templates tab provides access to available response templates. These templates contain reusable messages that agents can copy to provide quick and consistent messages to customers.
Email Templates	The Email Templates tab provides access to available email templates. These templates contain default values for fields that agents can add to email messages. These default values can include the recipients (email addresses in the To, Cc, and Bcc fields), the sender, the subject of the email, and text to include in the message body. For more information, see Email Templates.
Related Lists	The Related Lists tab provides access to the record's related lists. Related lists appear in the side panel in an accordion format that agents can expand and collapse as needed. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. For more information, see Related lists component in the Front-line case page topic.
Activity Stream	The activity stream displays a list of activities occurring on a case record. For more information, see Playbook activity stream component.

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Contextual side panel tabs (continued)

Tab	Description
Agent Assist	Agent assist provides agents with a list of resources that show possible solutions for the current record. This list is based on the record short description.
Search	From the list of search results, agents can do the following: • Select a source to see search results of that type. • Filter the list of search results. • Sort the list of search results. • Open the search results in full view in a record sub-tab. Agents can take the following actions: • View and attach an article. • Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful. • View successful actions by selecting the Actions history icon. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.
Related Items	The Related Items tab provides access to the case-related lists. The Case playbook: 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. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. For more information, see Playbook related items component.
Collaborate	The Collaborate feature enables agents to collaborate with stakeholders through multiple channels. For more information, see Collaborate component.

Activity stream

The activity stream helps agents stay informed by displaying a running history of updates and communications within a CRM Workspace record like field changes, comments, work notes, and emails.

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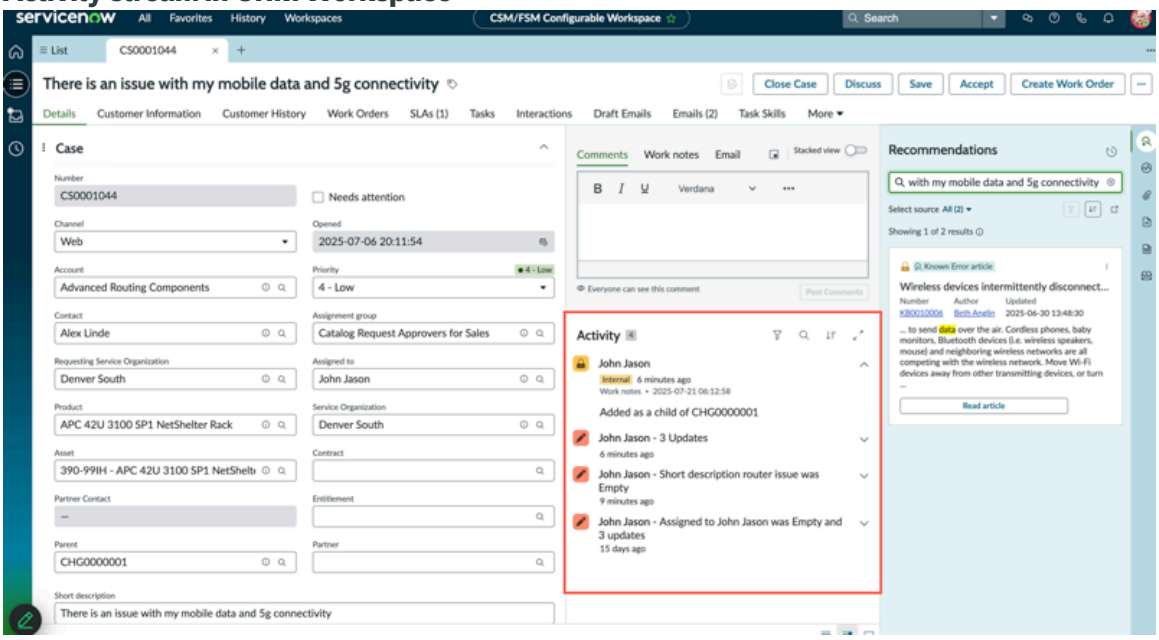
Activity stream in CRM Workspace



Activity Stream component

The Activity Stream component in UI Builder displays a list of changes made to a record.

The standard record page template in UI Builder uses the Activity Stream component alongside other components that create a record page. While the standard record page template offers a useful starting point, admins can customize or build their own record pages as needed.

The Activity Stream component is configured and customized by admins in UI Builder. For information on Activity Stream component configurations, see Activity Stream UIB Setup.

Additional information

For more information about working with the activity stream, see the following topics in the Configurable Workspace UI documentation:

- Administering Activity stream for Configurable Workspace
- Using the Activity stream in Configurable Workspace

Modeless dialogs

Modeless dialogs are windows that overlay the main window content in CRM Workspace. Customer service agents can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails.

A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables agents to interact with the window content and the overlay content at the same time. Agents can use modeless dialogs to do the following:

- Create comments and work notes to post to the activity stream.
- Create and send emails and reply to or forward emails.

After opening a modeless dialog, agents can move it around the screen and put it where they need it. This feature enables agents to reference information from the main window while drafting text in the overlay window.

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Thin compose modeless dialogs

The thin compose modeless dialog feature incorporates modeless dialogs into the activity stream. It enables agents to initiate a comment, work note, or email from the activity stream in a modeless dialog. Thin compose modeless dialogs:

- Auto expand to accommodate the text.
- Can be manually resized.
- Can be minimized after they are opened.
- Have the rich text editor enabled even when the `glide.ui.journal.use_html` system property is set to false.

Thin compose modeless dialogs are available on the following record pages:

- Front-line case page
- CSM default record page
- CSM Interaction record page
- CSM centered chat interaction record page
- CSM voice interaction record page
- Email interaction record page

Note: The thin compose modeless dialog feature has the Rich Text Editor enabled, which can add HTML tags along with the text to the **Additional comments** and **Work notes** fields on the case record. To remove these tags, see Updating the glide.ui.journal.use_html property.

Creating comments and work notes

Use modeless dialogs to create comments and work notes and post them to the activity stream.

Using modeless dialogs to create comments and work notes

Task	Description
Create a comment or work note	To create a comment or a work note: **1.** Select one of the following tabs at the top of the activity stream: ○ **Comments** ○ **Work notes** **2.** Add the text to the Compose window.
Post a comment or work note to the activity stream	To post a comment or work note, select one of the following actions from the Compose window: • **Post Comments** • **Post Work notes** The system posts the comment or work note to the activity stream. Saving the case record

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Using modeless dialogs to create comments and work notes (continued)

Task	Description
	also posts the comment or work note to the activity stream.
Open a comment or work note in a modeless dialog	Select the pop out ( ) icon to open a comment or work note in a modeless dialog. You can open a modeless dialog before or after you start entering text in the Compose window. **Note:** You can have one modeless dialog of each type (comments, work notes, and email) open at a time.
Return a comment or work note to the Compose window	After opening a comment or work note in a modeless dialog, you can return the text to the Compose window in the activity stream in the following ways: • Select the Continue editing in compose ( ) button at the top of the modeless dialog. • Select the **Pop in** link in the Compose window in the activity stream.
Minimize a modeless dialog	To minimize a modeless dialog, select the Minimize dialog ( ) button in the window header. Minimized modeless dialogs appear in the dock at the bottom of the workspace. For more information, see Workspace dock.
Open a minimized modeless dialog	Select a minimized modeless dialog from the dock to restore it. Items in the dock appear with the action type (email, comment, or work note) and an abbreviated title.
Discard a comment or work note	To discard a comment or work note: **1.** Select the Close dialog ( ) button in the modeless dialog header. **2.** Confirm the Close Dialog action by selecting **Continue** in the confirmation pop-up window.

The following guidelines apply to Compose windows for comments and work notes:

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- Draft comments and work notes are local to the browser. If the browser page is reloaded, the draft text is cleared.
- Comments and work notes stay synchronized on the form and in the modeless dialogs.
- The Compose window can be resized.

Creating emails

Use modeless dialogs to create and save email drafts and to send emails.

Emails that are sent from a modeless dialog are posted to the activity stream. Agents can reply to and forward emails from the activity stream.

Using modeless dialogs to create and send emails

Task	Description
Create and send an email	To create and send an email: **1.** Select the **Email** tab at the top of the activity stream. **2.** Fill out the fields on the email form: **a.** To, Cc, Bcc **b.** Subject **c.** Email body **3.** Select **Send email**. When creating emails and sending emails: • The Compose window automatically closes after the email is sent. • The email is posted to the activity stream.
Open an email in a modeless dialog	Select the pop out ( ) icon to open an email in a modeless dialog. You can open a modeless dialog either before or after you start entering text in the Compose window. **Note:** You can have one modeless dialog of each type (comments, work notes, and email) open at a time.
Return an email to the Compose window	After opening an email in a modeless dialog, you can return the email to the Compose window in the activity stream in the following ways: • Select the Continue editing in compose ( ) button at the top of the modeless dialog. • Select the **Pop in** link in the Compose window in the activity stream.

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Using modeless dialogs to create and send emails (continued)

Task	Description
Minimize a modeless dialog	To minimize a modeless dialog, select the Minimize dialog ( ) button in the window header. Minimized modeless dialogs appear in the dock at the bottom of the workspace. For more information, see Workspace dock.
Open a minimized modeless dialog	Select a minimized modeless dialog from the dock to restore it. Items in the dock appear with the action type (email, comment, or work note) and an abbreviated title.
Reply to or forward an email	To reply to or forward an email: **1.** Expand an email in the activity stream. **2.** Select one of the following buttons to open the Compose Email window: ○ **Reply** ○ **Reply all** ○ **Forward** **3.** Add the desired text. **4.** Select **Send email**. The Compose window automatically closes after the email is posted to the activity stream.
Add a link to a knowledge article	To add a link to a knowledge article: **1.** Select the Recommended Actions tab in the contextual side panel. **2.** View the list of knowledge articles or search for an article. **3.** Select the More Actions menu on the knowledge article card. **4.** Select **Attach and add link in email**. The system adds a link to the knowledge article in the body of the email.
Apply a template to an email	To apply a template to an email: **1.** Select the Apply templates icon ( ) in the Compose email modeless dialog footer to display a list of available templates. The Template preview modal displays the available email templates. It does

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Using modeless dialogs to create and send emails (continued)

Task	Description
	not display quick messages or response templates. **2.** Select a template from the list. You can also search for a specific template. The system adds the contents of the template to the body of the email. **Note:** If no templates are available, the icon does not appear in the footer.
Open a draft email in a subtab	Select the Pop out icon ( ) in the Compose Email window header to open the draft email in a subtab. The Compose Email window closes when the email opens in the subtab.
View a list of draft emails	Select the View drafts icon ( ) in the Compose Email window footer. Selecting this icon displays a list that includes the most recent email drafts. The list also includes the following actions: • **Manage drafts**: Displays the Manage drafts pop-up window. From this window, you can view a list of all draft emails. You can also delete email drafts from this window. • **Create new email**: Creates a new email in the Compose email window.
Select an email draft	Select the View drafts icon ( ) in the Compose Email window footer. Selecting this icon displays a list that includes the most recent email drafts. You can select a recent draft from this list. To view a list of all email drafts: **1.** Select the View drafts icon and then select **Manage drafts**. **2.** Select a draft from the list in the Manage drafts pop-up window. The system saves the current draft email and opens the selected draft email in the Compose Email window.

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Using modeless dialogs to create and send emails (continued)

Task	Description
Select an email draft from the Draft Emails related list	**1.** Select the Related Lists tab in the contextual side panel. **2.** Expand the Draft Emails related list. **3.** Select the Open draft icon on the desired draft email card. The system opens the selected draft email in a subtab.
Discard the current draft email	**1.** Select the Discard draft icon ( ) in the Compose Email window footer. **2.** Confirm the Discard action by selecting **Discard** in the confirmation pop-up window. The system displays a message that the draft email has been discarded.
Delete an email draft from the Manage drafts pop-up window	**1.** Select the View drafts icon ( ) in the Compose Email window footer. **2.** Select **Manage drafts** to display the Manage drafts pop-up window. **3.** Select an email to delete by enabling the check box. **4.** Select **Delete** in the pop-up window. **5.** Confirm the action by selecting **Delete** again.

The following guidelines apply to Compose windows for emails:

- An agent can create multiple email drafts.
- An agent can have one Compose window open at a time.
- The Compose Email window can be resized.

Collapsing and expanding the email header

The email header includes the following fields:

- **To**
- **Cc**
- **Bcc**
- **Subject**

You can expand and collapse the email header as needed by selecting the expand header ( ) and collapse header ( ) icons.

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When the email header is expanded, you can edit the information in these fields. When the email header is collapsed:

- The names in the **To**, **Cc**, and **Bcc** fields are combined into one line. If there is a long list of recipients, some of the names are replaced with "and more".
- The subject is displayed in a second line.
- The fields are not editable.

When you create a new email or forward an email, the header is expanded by default and displays the **To** and **Subject** fields. If you expand the **Cc** and **Bcc** fields, the collapse header icon is displayed.

When you reply to an email, the header is collapsed by default. Expanding the header shows all the fields that contain information.

Draft indicators

When a draft exists, visual indicators appear on composer tabs to show unsaved content:

- Email tab: Displays "Email (Draft)" text next to the tab name.
- Work notes tab: Displays a dot indicator next to the tab name.
- Comments tab: If the Comments tab is configured on a page, it also displays a dot indicator next to the tab name when a draft exists.

Compose Email modeless dialog footer icons

Several icons appear in the Compose Email modeless dialog footer that you can use when creating email drafts.

Footer icons

Icon	Description
Discard draft ( )	Select this icon to delete the current draft. Then confirm the delete action in the resulting confirmation message.
Apply template ( )	Select this icon to display a list of available templates. You can select a template from the list or search for a specific template. The list can display up to 10 templates. Selecting a template applies that template to the draft email. **Note:** If no templates are available, the icon does not appear in the footer.
View drafts ( )	Select this icon to display a list with recent draft emails as well as email-related actions. You can select an email draft from the list to display that draft in the Compose Email window. Email-related actions include:

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Footer icons (continued)

Icon	Description
	• **Manage drafts**: Displays the Draft Management pop-up window which includes a list of email drafts. Select a draft to display the contents in the Compose Email window. You can also delete email drafts from this pop-up window. • **Create new email**: Creates a new email draft in the Compose Email window.
Attach file ( )	Select this icon to attach files to an email draft **From computer** or **From record**. After attaching one or more files, you can hide or show the attachments.

Using form templates to create comments and work notes

You can create and use form templates that add content to the **Additional comments** and **Work notes** fields on a case record and then post that content to the activity stream.

Content to add	Description
Comment	If a template includes content to add to the **Additional comments** field on the case record, the system does the following: • Displays a modeless dialog for composing a comment. • Adds the content to the **Comments** field in the modeless dialog. Selecting **Post Comments** adds the content to the **Additional comments** field on the case record and to the activity stream.
Work note	If a template includes content to add to the **Work notes** field on the case record, the system does the following: • Displays a modeless dialog for composing a work note. • Adds the content to the **Work notes** field in the modeless dialog. Selecting **Post Work Notes** adds the content to the **Work notes** field on the case record and to the activity stream.
Comment and work note	If a template includes content to add to both the **Additional comments** and **Work notes** fields on the case record, the system does the following: • Displays two modeless dialogs, one for composing a comment and one for composing a work note. • Adds the content for the comment to the **Comments** field in the comment modeless dialog. • Adds the content for the work note to the **Work notes** field in the work note modeless dialog. Selecting **Post Comments** adds the content to the **Additional comments** field on the case record and to the activity stream.

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Content to add	Description
	Selecting **Post Work Notes** adds the content to the **Work notes** field on the case record and to the activity stream.

If text already exists in the **Additional comments** or **Work notes** fields, applying a template opens a modeless dialog and adds the template content. Selecting **Undo** removes the template content from the modeless dialog and replaces it with the existing text from the fields on the Case record.

Viewing attachments in modeless dialogs

Agents can view attachments in modeless dialogs rather than a full-screen view. This feature enables agents to view attachments while referencing the underlying case or interaction pages.

The *`Open attachment preview in modeless window`* UI Builder property controls the attachment display. This property is available at the workspace level and is set to true by default. When enabled, agents can do the following:

- Select an attachment to open the file in a modeless dialog.

  When an attachment is already open in a modeless dialog and a second attachment is opened, the second attachment opens in the same modeless dialog.

- Navigate through multiple attachments using a carousal.
- Download and delete attachments.

Note: Agents can view attachments in modeless dialogs when the attachments are available in the contextual side panel or in the activity stream. Viewing attachments from other locations such as the email composer or forms continues to use the full-page preview.

Updating the glide.ui.journal.use_html property

The Rich Text Editor (RTE) is enabled for modeless dialogs and the thin compose modeless dialog feature. It is not enabled for the instance unless the *`glide.ui.journal.use_html`* system property is set to true.

When you enter text in a comment or work note modeless dialog, the system adds that same text to the **Additional comments** and **Work notes** fields on the case record. HTML tags can appear along with the text in these fields.

To remove the HTML tags, enable the *`glide.ui.journal.use_html`* system property:

1. In the navigation filter, enter **sys_properties.list** to display a list of the properties stored in the System Properties [sys_properties] table.
2. Search for the *`glide.ui.journal.use_html`* property in the **Name** column.
3. Set the **Value** field to true and select **Update**.
4. Return to CRM Workspace and refresh the page.

Setting this property to true enables the Rich Text Editor for the **Additional comments** and **Work notes** fields on the case record and removes the HTML tags.

Workspace dock

The dock is a bar at the bottom of the CRM Workspace where agents can see drafts of current comments, work notes, or emails at a glance.

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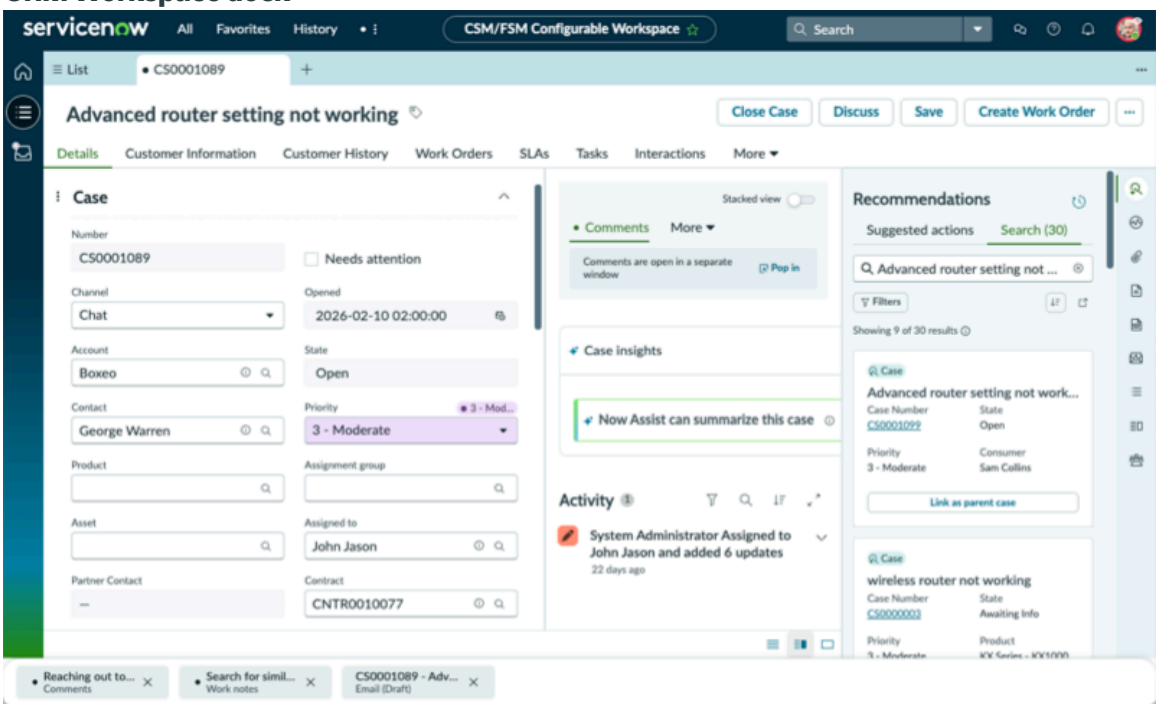
CRM Workspace dock



Agents can create drafts of comments, work notes, or emails in modeless dialogs and then minimize these drafts to the dock at the bottom of the workspace page. This feature centralizes drafts in the dock rather than behind a button.

Items appear in the dock with an action type, such as email, comment, or work note, and an abbreviated title. Select a draft from the dock to reopen the modeless dialog.

The dock can also include actions such as **Manage** and **Save**.

Note: Depending on the record page configuration, action buttons can appear in the dock or at the top of the page in the action bar.

The dock is a UI element that appears at the bottom of the workspace and is available on all of the CRM Workspace record pages.

CRM Workspace form templates

Create and edit form templates for use in CRM Workspace and then use the templates to automatically populate fields on case and interaction records.

Form templates simplify the process of creating and submitting new records by populating fields with selected values. In CRM Workspace, form templates are available in the Templates tab in the contextual side panel.

Form templates include advanced capabilities that let you control when and how they work. You can set conditions to show templates only for specific cases, choose which fields to populate based on the situation, insert variables that automatically fill in with customer information, and add pre-written emails. These capabilities help you create one flexible template instead of maintaining multiple similar templates.

Note: Form templates are available in two versions: basic and advanced. The advanced version is enabled by default for case and interaction records in CRM Workspace. The basic version is used in the Core UI and for records other than cases and interactions.

From the **Templates** tab, you can do the following:

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- View template cards that display information including the template name, description, and when the template was last used.
- View different lists of templates, including **Favorites**, **My Templates**, and **All**.
- Mark templates as Favorites by selecting the star icon on the template card.
- Sort the available templates alphabetically or by last used.
- Create a new template by selecting the Create icon (**+**) at the top of the **Templates** tab.
- Edit an existing template by selecting the More actions icon on the template card and then selecting **Edit**.

Templates tab

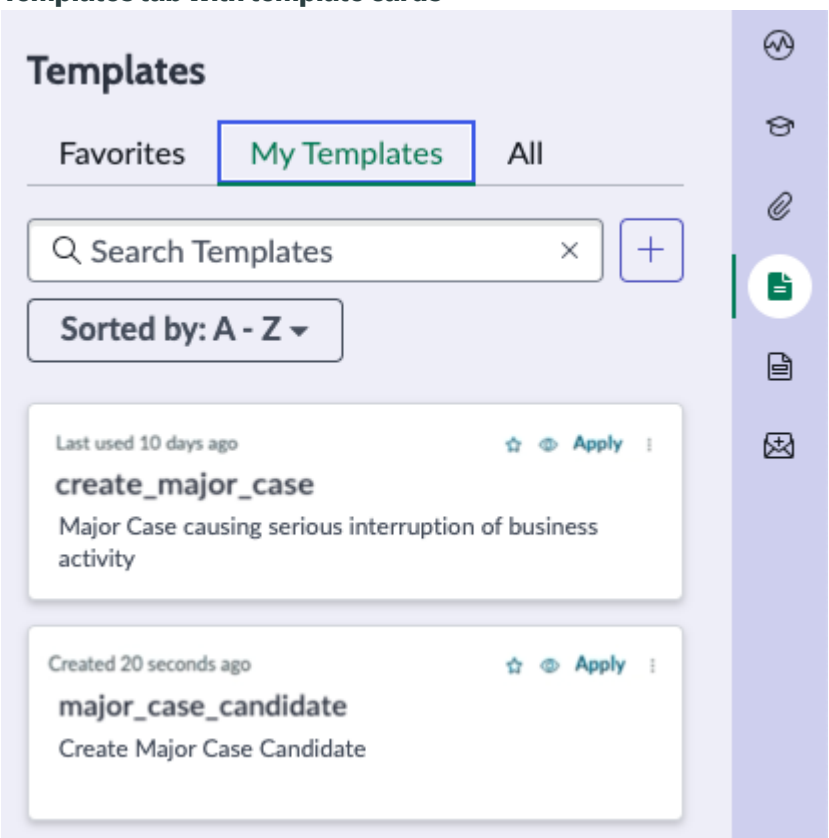
The **Templates** tab in the contextual side panel includes form templates that are available to the current user. This tab includes three lists of templates:

- **Favorites**: Templates that the user has marked as a favorite by selecting the star icon on the template card. The templates that are added to this list are accessible across different records.
- **My Templates**: Templates created by the user.
- **All**: All templates available to the user.

Within each list of templates, users can do the following:

- Search for templates by entering a keyword in the search box.
- Sort the available templates, either last used or alphabetically, by making a selection from the drop-down menu.

Templates tab with template cards



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Template cards

The Templates tab displays a card for each template in a list. These cards provide information about the templates, including:

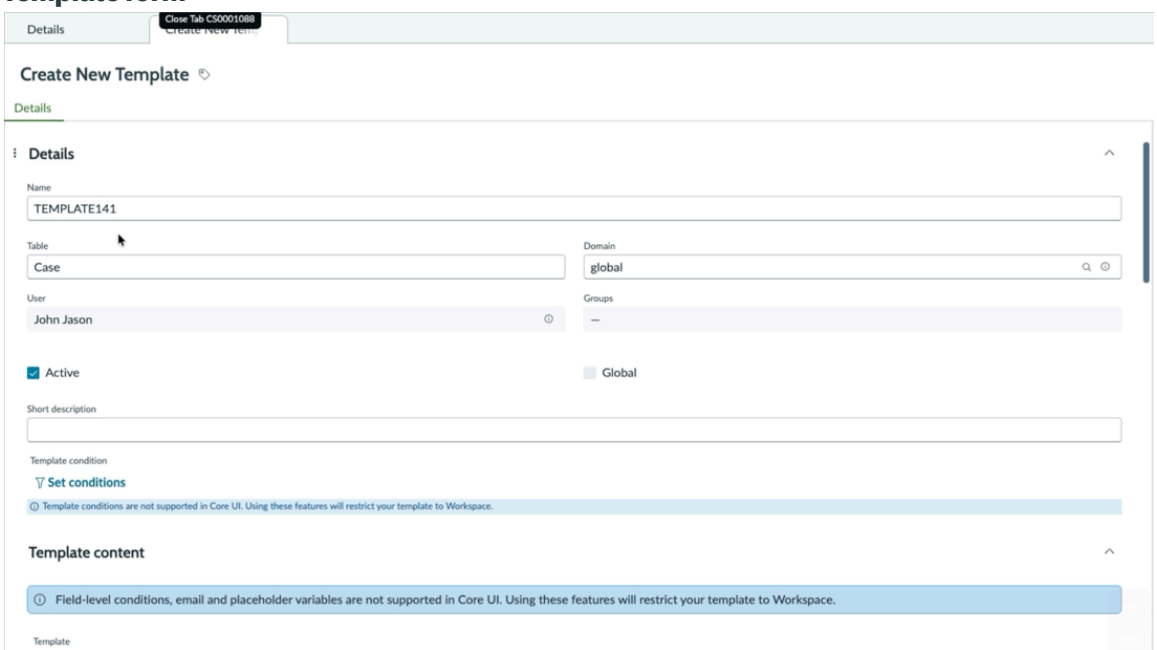
- A multi-line description of the template.
- A timestamp that shows when the template was last used.
- A star icon that you can use to mark a template as a favorite.
- A preview icon to review template before applying.
- An **Apply** button to apply the template to the current record.

Template form

The template form is used to create and edit templates. This form includes two collapsible form sections:

- **Details**: Includes information about the template, such as the template name and the table that the template applies to.
- **Template**: Includes the selected fields and the configured values for those fields which are applied to a record.

Template form



The Template section includes a row for each field that has been added to the template. These rows are numbered for readability and easy reference. The fields and configured values in each row are also labeled for readability.

- **Field**: The field to update on the record.
- **Update to**: The value to use for that field.

The template form is available when creating a new template from a case or interaction or editing an existing template. The template form tab header displays a description of the current action:

- **Create new template**: The system displays this tab header when you create a template.
- **Edit template**: The system displays this tab header when you save the changes to a new template or when you edit a template.

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Advanced form template capabilities

Form templates in CRM Workspace support advanced capabilities that give users more control over when and how templates work. Use these capabilities to create flexible templates that adapt to different situations.

Advanced capabilities include:

- Template-level conditions
- Field-level conditions
- Placeholder variables
- Email templates

Note: When you add any advanced capability (template-level conditions, field-level conditions, placeholder variables, or email templates) to a template, that template will not work in Core UI. Advanced capabilities are only available in CRM Workspace.

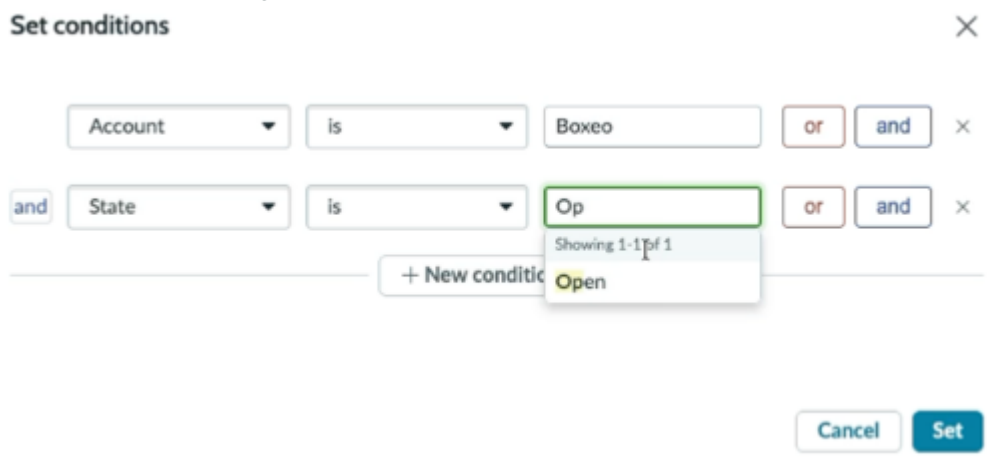
Template-level conditions

Template-level conditions control which cases show your template in the Templates list.

How to use: Select **Set conditions** under Template Condition. In the Set conditions dialog, select a field, choose an operator, and enter a value. Add multiple conditions using **AND** or **OR** buttons. For example: **[Account is XYZ] [AND] [State is Open]**. Select **Set** to save.

Templates that don't meet the conditions don't appear in Templates list. The template only appears for records matching these conditions. Start with template-level conditions before adding field-level conditions, and document complex conditions in the template description.

Set conditions dialog box



Field-level conditions

Field-level conditions control which fields populate when a template is applied, creating one flexible template instead of multiple similar ones.

How to use: When adding fields to a template, select the filter icon next to a field. In the Set Conditions dialog, select a field, operator, and value. Use **AND** or **OR** for multiple conditions. Select **Set** to save. Fields without conditions populate every time. Fields with conditions populate only when the condition is met. The conditions appear as pills in the Details section with an **Edit conditions** link.

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Example: A template has 10 fields. The **Assigned Team** is set to populate only when **Category** = **Technical**. For billing cases, 9 fields populate (Assigned Team doesn't). For technical cases, all 10 fields populate.

Placeholder variables

Placeholder variables are special codes that the system automatically replaces with real information when you apply a template.

How to use: When creating a template, select in a text field and select the variable picker icon. Browse available variables (all start with $ like *$customer.name*, *$case.number*, *$case.short_description*). Select a variable to insert it. When you apply the template, the system replaces variables with actual data from the case or interaction. Use variables for repetitive personalization, but avoid overuse that makes content feel generic. Test variable output to verify correct display.

Example: Template text "Hi *$customer.name*, thank you for contacting us about case *$case.number* regarding *$case.short_description*" becomes "Hi Sarah Johnson, thank you for contacting us about case CS0012345 regarding login problems."

Email templates

Email templates let users add pre-written email content to a template. When the template is applied to a case or interaction, a formatted email draft appears in the **Email** tab.

How to use: In the Email (optional) section, type your message in the Rich Text Editor (use toolbar for formatting). Select the variable picker to insert variables. Use **Content Placement** to choose how content is inserted:

- **None**
- **Replace existing text**
- **Insert before existing text**
- **Insert after existing text**
- **Insert at cursor**

Save the template. When you apply the template, the email draft appears with variables resolved. The system creates the email as a draft only and does not automatically send. If you reapply the template, the system replaces the existing email draft. When previewing a template, you can view both dynamic placeholders (*$variable*) and their resolved values. Review the email, make any necessary edits, and select **Send**.

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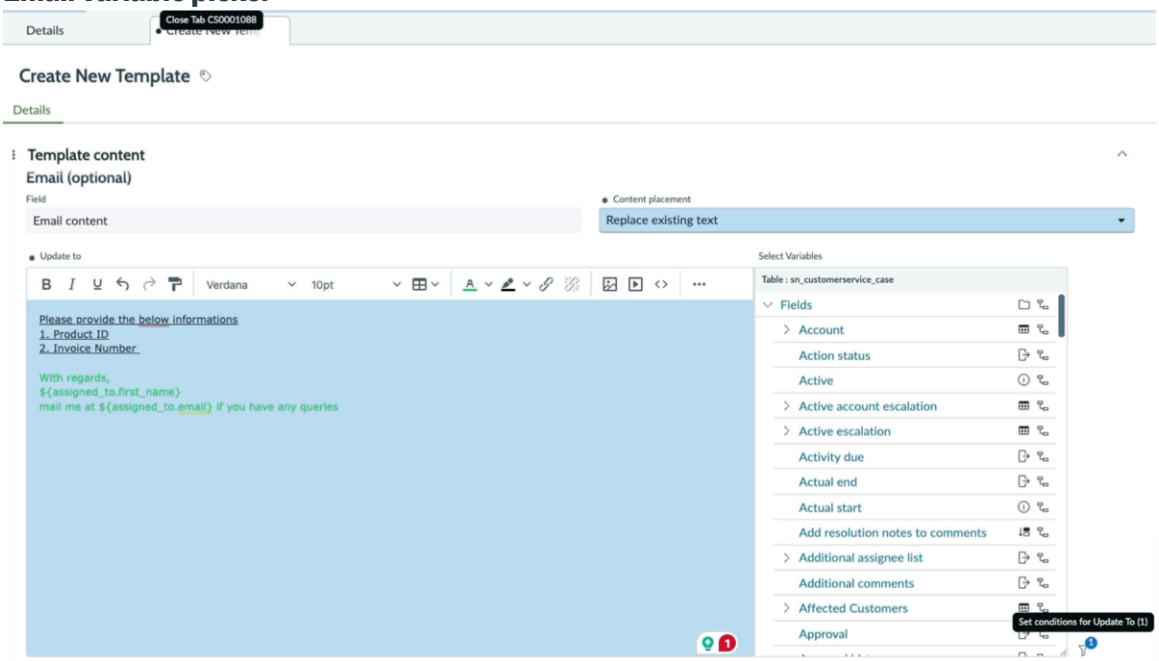
Email variable picker



Example: A "Password Reset" template with email content displays as "Dear Sarah Johnson, we received your password reset request for case CS0012345."

Applying templates

Templates appear in the Templates list when you open a case or interaction that matches the template conditions. For example, a template with conditions "Account is XYZ AND State is Open" only appears when a record has those values.

To apply a template:

1. **Select a template:** Choose a template from the Templates list.
2. **Preview (optional):** Select the preview icon on the template card to review template details.
3. **Apply:** Select **Apply**. Fields populate with template values. If you attempt to reapply a template to the same record, the system displays an alert warning that existing values may be overwritten.
4. **Verify:** Updated fields show a black dot (●) next to their labels. The form displays "Unsaved" at the top.
5. **Save:** Review the changes and select **Save** to save the record.

To undo: Select **Undo** in the Templates panel before saving.

Example: A case has **Account = XYZ and State = Open**. The template "State is Open and Account is XYZ - More info Needed" appears in the Templates list. After applying **Channel**, **Priority**, and **Assignment group** fields show dots (●) indicating updates. The changes are reviewed and saved.

Adding comments, work notes, and email with templates

You can create and use form templates that add content to the **Additional comments** and **Work notes** fields on a case or interaction and then post that content to the activity stream. Selecting a template displays a modeless dialog with the template content. For more information, see Modeless dialogs.

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Using template email content: When a template is applied that includes email content, an email draft appears in the Email tab. Select the **Email** tab to view the draft. The **To**, **Cc**, and **Subject** fields are populated based on case information. Review the email, make any edits if needed, and select **Send**.

Chat summarization

Use the chat summarization feature to automatically create summaries of chat conversations. The chat summary enables an agent to quickly understand the interaction without reading the entire transcript of the conversation.

At the completion of a chat conversation, the system automatically generates a chat summary and adds it to the **Chat summary** field on the Interaction record. This summary is created from the transcript of the chat conversation.

The system calls the chat summary prediction, which generates the summary from predicted values and updates the **Chat summary** field. It also displays the summary as a top recommendation for this field.

An agent can modify and save the information in the **Chat summary** field. To revert the summary to the predicted value, the agent can select the value in the top recommendation.

The chat summarization feature works with or without chat wrap-up enabled. For more information, see Interaction wrap up.

AI indicators

When the system generates a summary and automatically populates the **Chat summary** field, it also does the following:

- Displays an AI icon above the field which indicates that the summary is generated by AI.
- Displays a banner at the top of the Interaction record. The message in the banner advises the agent to check the summary and update the information if it is not accurate.

The agent can dismiss the banner. If the agent manually updates the **Chat summary** field, the AI icon is no longer displayed.

CRM Workspace chat session tabs

Use visual indicators on chat session tabs, such as colors and icons, to alert agents to unread chat messages and SLA threshold timers.

The chat session tabs feature helps agents to manage multiple interactions efficiently. Agents can use visual indicators to reduce the risk of threshold timer breaches, improve chat prioritization, and optimize response times. This feature enables agents to multitask effectively while maintaining service level commitments.

The chat session tabs feature introduces a color-coded system for chat session tabs in CRM Workspace based on configured Service Level Agreement (SLA) thresholds. Additional visual indicators alert agents about unread messages, chat status, and unsaved changes. These visual cues help agents to prioritize their interactions by tracking chat duration and alerting them when conversations require immediate attention.

Benefits

The chat session tabs feature provides customers with the following benefits.

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- Improved prioritization: Agents can visually track the SLA status of each chat by glancing at the tab color and use that information to prioritize customer responses.
- Agent multitasking: Tab color changes and real time notifications help agents to handle multiple interactions simultaneously, minimizing the risk of missing crucial chats.
- Agent productivity: The system helps agents respond more efficiently by highlighting conversations based on urgency, improving customer engagement and satisfaction.

Key features

Chat session tabs provide the following key features.

Chat session tab features

Feature	Description
Real-time duration tracking for chat sessions	This feature actively tracks the duration of a chat and alerts the agent when predefined SLA thresholds are reached. • The timer begins when a customer sends a message to an agent and the tab for that chat interaction is inactive. • The inactive tab cycles through different colors to alert the agent to the unread message and the approaching SLA thresholds. • The timer resets once the agent engages with the tab.
SLA threshold timers	Virtual agent admins can configure a minimum of one and a maximum of three levels of SLA threshold timers. When the admin selects a workspace and enables the **Session Tab Enabled** button, the system adds the first level automatically. Then they can add one or two additional levels if desired. For each level, the admin can select a timer value and tab color.
Tab colors	Tab colors indicate the status of a chat with one or more unread messages. Inactive tabs with unread messages change color to highlight critical wait times. Virtual agent admins can select a different color for each configured SLA threshold level.
Unread message counters	Inactive tabs display a counter that shows the number of unread chat messages.

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Chat session tab features (continued)

Feature	Description
	The counter uses a background color that is a darker shade of the configured tab color.
Tab messages	Messages on the chat session tabs appear below the customer name and notify the agent of the following chat conditions: • Chat is in wrap-up • Chat has ended Agents see the appropriate message on the tab depending on the condition of the chat.
Unsaved changes indicator	A gray circle on a chat session tab indicates that there are unsaved changes on the tab. The circle disappears once the changes are saved.

SLA threshold timers

Virtual agent admins can configure up to three levels of SLA threshold timers for inactive chat session tabs. For each level, admins can set a timer and select a unique tab color.

These timers alert agents to unread messages in inactive chats by changing the tab color. If an agent leaves a customer's chat unanswered beyond the length of time defined in these threshold timers, the system changes the tab color.

Chat session tab SLA threshold levels

Level	Description
Level 1: warning	This timer alerts the agent to an SLA breach by changing the color of an inactive tab when it reaches the selected duration. Default setting: 30 seconds after the first new message is received.
Level 2: critical	This timer alerts the agent to a critical SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 1 minute after the first new message is received. **Note:** The length of time for the Level 2 timer must be greater than the Level 1 timer.
Level 3: severe	This timer alerts the agent to a severe SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 2 minutes after the first new message is received.

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Chat session tab SLA threshold levels (continued)

Level	Description
	Note: The length of time for the Level 3 timer must be greater than the Level 2 timer.

For more information, see Configure chat session tabs.

Tab colors

The chat session tabs feature uses tab background colors to provide information at a glance. Colors indicate tab status such as the active tab and inactive tabs that have one or more unread messages.

- **Active tab**: A white background indicates the active tab. This is the tab where the agent is currently working.
- **Inactive tabs**: A colored background indicates an inactive tab that has one or more unread messages. Tabs transition to different colors to highlight chats that have reached the configured SLA thresholds.

Virtual agent admins can configure up to three SLA threshold levels for chat session tabs. For each level, the admin can set a timer for the threshold level and select a background tab color. Agents see different colors in the chat session tabs based on the threshold timer value.

The background tab color changes when an inactive tab with unread messages reaches the first SLA threshold level. The tab maintains the current color until the timer reaches the next configured SLA threshold level.

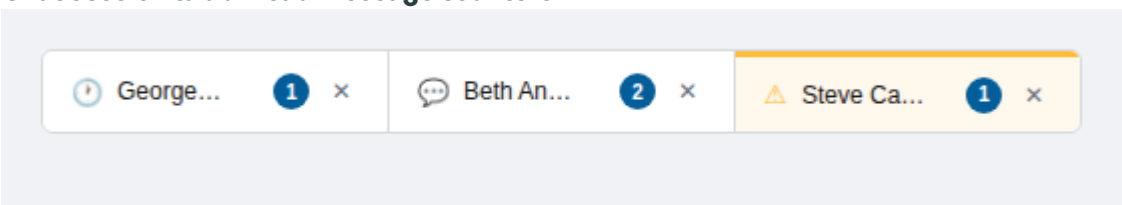
For more information, see Configure chat session tabs.

Unread message counters

Each inactive tab includes a counter that displays the number of unread chat messages.

The counter uses a background color that is a darker shade of the configured tab color.

Chat session tab unread message counters



When a chat message is received, the counter updates to display the total number of unread messages. After selecting the tab, an agent can see the unread messages in the chat window.

Selecting an inactive tab clears the tab color and resets the unread messages counter. The threshold timer and counter restart when the agent navigates away from the tab.

When a customer ends a conversation or a chat session times out, the tab color changes to blue and the unread messages counter disappears.

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Viewing unread messages

When an agent selects an inactive tab and returns to a chat conversation, they can see the unread messages in the chat window. This window uses a separator between the older messages and the unread messages and displays the time when the first unread message was sent. This separator appears if there is a time difference greater than 30 seconds between the first new message and the last previous message.

Maximum number of tabs

An agent can have a maximum of 10 tabs open at one time. If an agent attempts to open additional tabs, the system displays a message that advises to close one or more tabs before opening a new tab.

Transferring chats

There are two ways to transfer a chat from one agent to another: manual transfer and automatic transfer.

Chat session tabs for transferred chats

Transfer type	Description
Manual transfer	When an agent manually transfers a chat to another agent and the new agent accepts the chat: • The unread messages counter is not displayed on the chat session tab. • The separator is not displayed between new and older messages. The interaction is treated as new for the receiving agent. • The new agent experiences the tab color changes as configured by the admin when new messages arrive from the customer. • The new agent sees the unread messages counter update when new messages arrive.
Automatic transfer	When a chat is automatically transferred to another agent or to a queue: • The unread messages counter is not displayed on the chat session tab. All messages in the chat are in an unread state for the new agent. • The separator is not displayed between new and older messages. The interaction is treated as new for the receiving agent. • The new agent experiences the tab color changes as configured by the admin when new messages arrive from the customer. • The new agent sees the unread messages counter update when new messages arrive.

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If a chat is transferred to a queue, SLA threshold timers and tab colors are applicable to the next agent who picks up the case.

When an agent seeks help from a colleague or manager using the Agent Whisper feature, the SLA threshold timers and tab behavior are applicable only for the owner agent. They don't apply to anyone else participating in the interaction.

Configuring the chat session tabs feature

Users with the Virtual agent admin role can enable the chat sessions tab feature and configure SLA threshold timers for chat sessions from the Conversational Interfaces (CI) Admin console.

When this feature is enabled, chat session tabs display colors to indicate the chat status. These colors are determined by SLA threshold timers that alert agents to impending SLA breaches.

For more information, see Configure chat session tabs.

Configure chat session tabs

Configure settings such as duration and color for the chat SLA threshold timers for a selected workspace in the Conversational interfaces (CI) Admin Console. These timers alert agents to unread messages in inactive chats.

Before you begin

Role required: virtual_agent_admin

About this task

Enable the chat session tabs feature and select the workspace that the feature applies to.

You can configure a minimum of one and a maximum of three chat SLA threshold timers for a workspace. These timers alert agents to unread messages by changing the tab colors of the inactive chats.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Settings**.
   This displays the CI Admin Experience with the Settings tab selected.
2. Select **Agent Chat** on the left side of the CI Admin Experience.
   This displays the Agent Chat settings screen.

   Note: If you don't have the required permissions to modify these settings, the following message appears: `You do not have the required permissions to modify these settings. Please contact your administrator.`

3. In the Session Tab Settings section, enable the **Activate** button in the upper right corner and select **Save**.
   This is a global switch that enables the feature for an instance.
4. Select **CRM Workspace** in the **Select a workspace for tab settings** field.
   This is the workspace for which you want to enable the chat session tabs feature.
5. Enable the **Session Tab Enabled** button and select **Save**.

   This enables the chat session tabs feature for the selected workspace and adds the Level 1 timer automatically.

   When enabled, inactive tab colors change color to alert agents to unread messages. You can configure a minimum of one and a maximum of three SLA threshold timers that alert agents to impending SLA breaches.

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Note: Disabling the Session Tab doesn't remove the saved workspace. The workspace remains available and can be accessed later.

6. Configure up to three SLA threshold breach warnings.

   a. Select the length of the timer for the **SLA breach warning (Level 1)**.
   This timer alerts the agent to an SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 30 seconds after the first new message is received.

   b. To configure a second SLA breach warning, select **Add Level**.

   c. Select the length of the timer for the **SLA breach warning (Level 2)**.
   This timer alerts the agent to a critical SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 1 minute after the first new message is received.

   Note: The length of time for the Level 2 timer must be greater than the Level 1 timer.

   d. To configure a third SLA breach warning, select **Add Level**.

   e. Select the length of the timer for the **SLA breach warning (Level 3)**.
   This timer alerts the agent to a severe SLA breach by changing the color of an inactive tab when it reaches the selected duration. The default setting is 2 minutes after the first new message is received.

   Note: The length of time for the Level 3 timer must be greater than the Level 2 timer.

7. Select the tab color for each of the configured SLA threshold breach warnings in the **Tab color** field and then select **Apply**.
   You must select a unique tab color for each warning level. After applying your selection, you can see a preview of the tab with the selected color.
8. Select **Save**.
   The workspace is added to the Configured workspaces list in the Session Tab Settings section.

Edit or remove chat session tabs

Edit the settings for configured SLA threshold levels, add or remove SLA threshold levels, or remove workspaces from the Configured workspaces list in the Conversational interfaces (CI) Admin Console.

Before you begin

Role required: virtual_agent_admin

About this task

The Session Tabs Settings section of the Agent Chat settings screen lists the workspaces that have configured SLA threshold levels. Under the Configured workspaces heading, you can see a list of the configured workspaces and the SLA threshold levels that have been configured for each workspace.

From this section, you can do the following:

- Remove a workspace from the Configured workspaces list.
- Edit the SLA threshold levels for a workspace:

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- Update the timer value and tab color for an SLA threshold level.
- Add or remove an SLA threshold level.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Settings**.
   This displays the CI Admin Experience with the Settings tab selected.
2. Select **Agent Chat** on the left side of the CI Admin console.
   This displays the Agent Chat settings screen.
3. Scroll to the Session Tab Settings section to view a list of configured workspaces.
   This list displays the workspaces that have been configured for the instance. It also displays the SLA threshold levels that have been configured for each workspace.
4. To edit a workspace, select **Edit**.
   The details of the configured SLA threshold timers are displayed in the Set SLA Levels section.

   a. From Set SLA Levels section, you can perform the following tasks:
      - Update the timer value for an SLA threshold level.
      - Update the tab color for an SLA threshold level.
      - Add an SLA threshold level.
      - Remove an SLA threshold level.

   b. Select **Save** on the Agent Chat settings screen to save your changes.

5. To remove a workspace from the Configured workspaces list:

   a. Select **Remove** for the desired workspace.

   b. In the confirmation pop-up window, select **Remove workspace**.
      The workspace is removed from the Configured workspaces list in the Session Tab Settings section.

Interaction wrap up with modeless dialog

Interaction wrap up provides agents with dedicated time after each call or chat to finalize interaction details. Agents can use this time to wrap up their work before starting a new conversation.

When interaction wrap up is enabled, an interaction record moves from the Work In Progress state to the Wrap Up state at the end of a customer conversation. This configurable period of time enables agents to complete tasks such as posting work notes and updating record information before moving on to assist other customers.

While in the Wrap Up state, an agent's capacity is not reduced until the state of the interaction moves to Closed Complete.

Interaction wrap up features

Interaction wrap up includes several configurable features:

- Wrap-up codes: Agents can select from a list of codes that provide information about how the interaction was resolved.
- Wrap-up notes: Agents can provide additional information about the interaction resolution.

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- Wrap-up timer: Displays the duration of the wrap-up period. When the end of the duration is reached, the system automatically ends the wrap-up period and saves the wrap-up data with the default code and notes field blank.
- Wrap-up modeless dialog: Displays when the agent ends an interaction. Includes the wrap-up timer and fields for the wrap-up code and notes.

Interaction wrap up also includes wrap-up segments, which store interaction wrap-up data. Wrap up segments enable multiple wrap ups per interaction. For example, when one agent transfers an interaction to another agent and each agent completes a wrap up for the same record.

Interaction wrap-up benefits

Interaction wrap up provides agents with dedicated time to complete their work on an interaction. If enabled, a wrap-up timer displays the remaining time in the wrap-up period. Agents can complete and submit the wrap-up data within the wrap-up period or allow the system to automatically complete the wrap-up period when the time expires.

Managers can configure the length of the wrap-up period for their agents. Managers can also access reports on wrap-up time usage and effectiveness and use analytics to track data accuracy and agent productivity improvements.

Admins can set and manage wrap-up time limits for voice and chat interactions and create wrap-up codes. Agents can quickly select from a list of available codes during wrap-up.

Wrap-up codes

Wrap-up codes provide information about how an interaction was resolved. Agents can select a wrap-up code when wrapping up an interaction in CRM Workspace. When wrap-up codes are enabled, agents can select a code from the configured list in the wrap-up modeless dialog.

System administrators can create wrap-up codes. From the Interaction Wrap Up Configuration record, system administrators can also do the following:

- Enable wrap-up codes.
- Select the wrap-up codes that are available to agents in the wrap-up modeless dialog.
- Select a default wrap-up code.

For more information, see the following topics:

- Create an interaction wrap-up configuration
- Create interaction wrap up codes
- Enable interaction wrap up codes

Wrap-up timer

The interaction wrap up timer displays a countdown of the wrap-up period. The wrap-up timer starts when the wrap up period begins.

Agents can complete their work within the wrap-up period and submit the wrap-up data. If agents do not complete their work, the system automatically ends the wrap-up period and saves the wrap-up data with the default code and notes field blank.

Depending on the settings in the Interaction Wrap Up Configuration record, the wrap-up timer appears on an interaction record in one of two locations:

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- In the wrap-up modeless dialog: The timer is displayed in the modeless dialog if wrap-up codes are enabled.
- In the interaction record header secondary values. The timer is displayed in the secondary values if wrap-up codes are not enabled.

The system administrator can configure the display of the wrap-up timer by enabling the **Show duration to agent** field on the Interaction Wrap Up Configuration record.

The timer counts down the amount of time specified in the **Duration in seconds** field. The background color of the wrap-up timer changes as it counts down the duration.

Background color	Description
Green	Time remaining is between 100% to 50% of duration.
Yellow	Time remaining is between 50% and 25% of duration.
Orange	Time remaining is between 25% and 0% of duration.
Red	When the timer reaches 0.00, the display turns red and then disappears. The system updates the state of the interaction record to Closed Complete.

Wrap-up notes

Agents can provide additional information about the interaction resolution in the wrap-up notes. After selecting a code in the wrap-up modeless dialog, agents can add this information in the **Notes** field.

Wrap-up modeless dialog

When wrap-up codes are enabled in the Interaction Wrap Up Configuration record, the system displays the wrap-up modeless dialog during the wrap-up period.

The wrap-up modeless dialog includes the following fields:

- Wrap up timer (when configured)
- Wrap up code
- Notes

The agent can select a code and add wrap-up notes and then select **Submit & close** to complete the interaction. The wrap-up data is saved in a segment record and the state of the interaction changes to Closed Complete.

If the wrap-up time expires before the agent selects **Submit & close**, the system closes the modeless dialog and saves the wrap-up data with the default code and no notes.

Agent actions that impact the wrap-up modeless dialog:

Action	Result
Initiating an outbound conversation during the wrap-up period	The system ends the countdown and closes the modeless dialog.
Changing the agent status during the wrap-up period	The system ends the countdown and closes the modeless dialog.

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Action	Result
Logging out during the wrap-up period	If an agent logs out during the wrap-up period without selecting **Submit & close**, the wrap-up time continues. If the agent does not log back in, the system closes the wrap-up.
Closing the interaction while in wrap up mode	The system displays a warning message. If the agent still wants to close the interaction, the system submits the wrap-up using the default wrap-up code.
Transferring a call to another agent	Each agent's wrap-up period begins the moment they exit the call. This behavior applies to both warm and cold transfers. When a call is transferred from one agent to another, each agent's wrap-up period begins the moment they exit the call.
Cancelling an inbound or outbound call	When a caller cancels an inbound call that hasn't been connected to an agent or agent cancels an outbound call, wrap-up is not initiated.

Wrap-up segments

The system stores interaction wrap-up data in wrap-up segments. Storing the data in segments enables multiple wrap-ups per interaction. For example, when one agent transfers an interaction to another agent, each agent can complete a wrap-up for the same interaction record.

Interaction wrap-up segment records are stored in the Interaction Wrap Up Segment table [interaction_wrap_up_segment]. Customer and consumer agents have read access to this table.

My Wrap Ups list

The My Wrap Ups list displays a list of all wrap-up records for the current user. To access this list in the Lists tab, navigate to **Interactions** > **My Wrap Ups**. This list view includes a link to the interaction record, the wrap-up state (In progress or Complete, and the wrap-up code and notes).

The following roles have access to the My Wrap Ups list:

- Customer service agent (sn_customerservice_agent)
- Consumer service agent (sn_customerservice.consumer_agent)
- System administrator (admin)

Wrap up controller

There are two different controllers for interaction wrap up:

- Interaction UI controller: Original controller; includes legacy wrap-up functionality.
- Wrap up controller: New controller introduced in Yokohama; includes wrap-up codes and the wrap-up modeless dialog.

The Wrap up controller includes output properties that determine where the wrap-up timer is displayed: in the modeless dialog or in the interaction header secondary values. The Wrap up controller also controls how the timer is updated.

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The CSM Interaction record page and the CSM voice interaction record page include an input property that determines the wrap-up functionality: **disableLegacyWrapUpLogic**.

- If set to false: the wrap-up functionality remains the same. For upgrade customers, this prevents conflicts with the current or custom wrap-up functionality. The default value of this property is false.
- If set to true: the interaction record page uses the new wrap-up functionality.

To edit this property:

1. In UI Builder, select the CRM Workspace experience.
2. Select the CSM Interaction record page.
3. In the Data and scripts section on the left side, select CSM Interaction Record to open the Edit CSM Interaction Record modal.
4. In the Configure tab of the modal, enable or disable the **disableLegacyWrapUpLogic** property.

Interaction record pages

The wrap-up controller, wrap-up codes, and wrap-up modeless dialog are available on the following record pages in CRM Workspace:

- CSM Interaction record page
- CSM Voice interaction record page

AI interaction wrap-up

AI interaction wrap-up provides agents with AI assistance during the interaction wrap-up period. Use this feature to generate wrap-up content for interaction records, such as the wrap-up code and notes.

The AI interaction wrap-up feature uses AI to generate wrap-up content for interaction records during the wrap up period. This feature evaluates the text in the customer conversation to determine the wrap-up code and create the wrap-up notes.

Agents can review and modify the AI-generated wrap-up content before submitting it. If there's insufficient context to determine a wrap-up code, the system uses the default wrap-up code.

Note: The AI interaction wrap-up feature uses the Wrap Up Completion skill to generate the wrap-up content. For more information, see Enable ServiceNow Otto to generate wrap up code and notes summary.

The AI interaction wrap-up feature is available for the following interaction record pages in CRM Workspace:

- CSM interaction record page
- CSM voice interaction record page
- CSM centered chat interaction record page

How it works

The wrap-up period begins when either the agent or the customer ends a conversation on an interaction record. This moves the record to the Wrap Up state, starts the wrap-up period, and displays the Wrap up modeless dialog.

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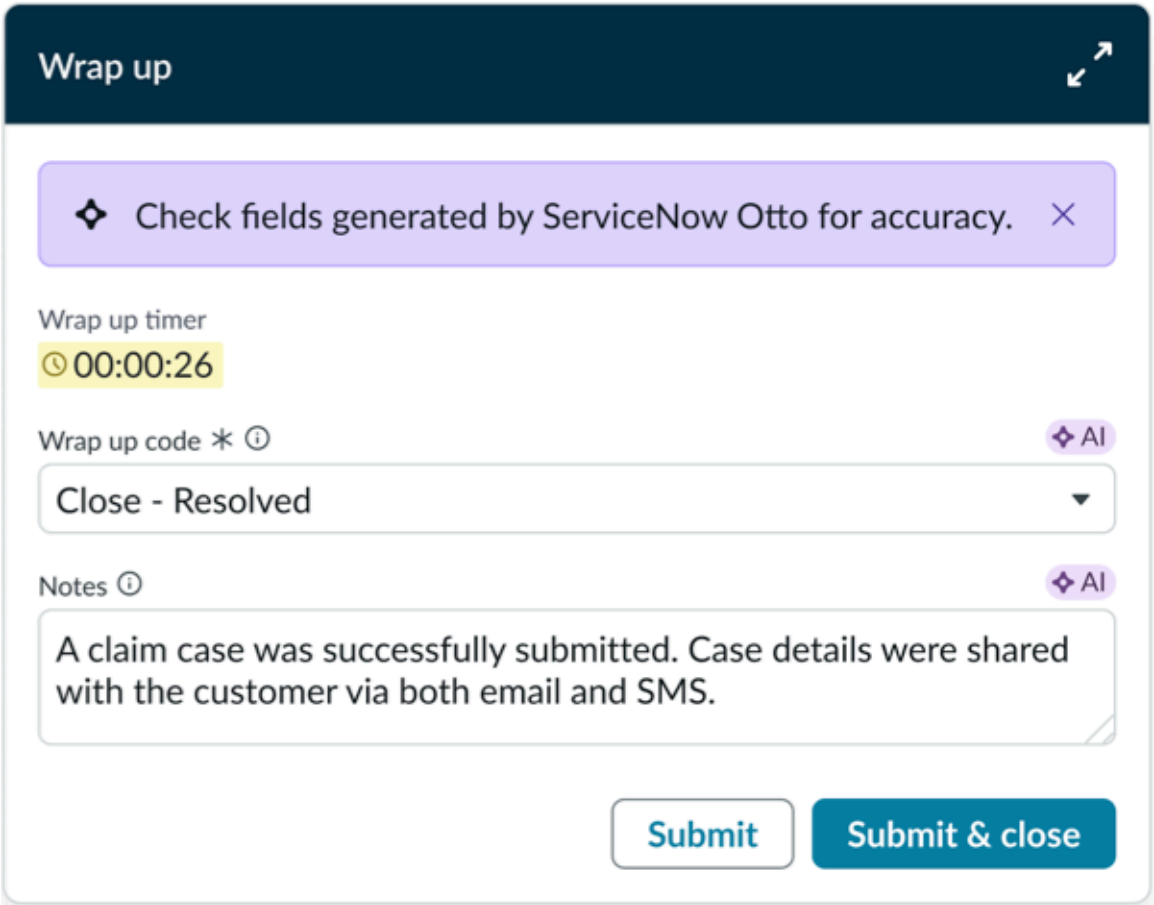
Wrap up modeless dialog with AI interaction wrap-up enabled



The system auto-populates the **Wrap up code** and **Notes** fields with AI-generated content. After the fields are populated, the modal displays a message in a banner to check the AI-generated content for accuracy.

If an agent selects a wrap-up code or enters text in the **Notes** field before the AI generation is completed, the system preserves the agent's inputs.

If content for the **Wrap up code** or **Notes** fields fail to update, the following banner message is displayed in the Wrap up modeless dialog: `GenAI content unavailable. Please complete manually.`

Using AI interaction wrap-up

The AI interaction wrap-up feature is enabled by default by the *`com.glide.interaction.auto_generate_ai_wrap_up`* system property. When an agent ends a conversation, the system displays the Wrap up modeless dialog, selects a wrap-up code, and generates the wrap-up notes.

If the feature is inactive, the Wrap up modeless dialog includes the **Run** *`ServiceNow Otto`* button that agents can use to create AI-generated notes.

AI sparkle icon

The AI-generated fields display the AI sparkle icon.

- The icon appears when a field includes AI-generated content.
- The icon disappears if an agent edits a field.
- An agent can hover over the icon to display an informational message.

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Wrap-up codes

Agents assign wrap-up codes to indicate the subject or the outcome of each interaction. Agents can select these codes from the **Wrap up code** field on the Wrap up modeless dialog.

When the content for the **Wrap up code** field is generated by AI, the system selects the default AI code.

The **Wrap up code** drop-down menu includes the codes that have been configured for the communication channel. If an AI recommendation code has been configured, this code appears at the top of the menu under the **AI Recommendation** header.

Wrap-up notes

The system evaluates the text in the customer conversation to generate the wrap-up notes.

If an agent enters text in the **Notes** field before the AI generation is complete, the system preserves the agent's input and adds the AI-generated content below this text.

If an agent edits the **Notes** field, the **Insert AI notes** button replaces the sparkle icon. Selecting **Insert AI notes** appends the AI-generated notes after the text entered by the agent.

Note: The **Insert AI Notes** button retrieves the previously generated AI notes rather than regenerating them.

Configuring AI interaction wrap-up

1. Enable the Wrap Up Completion skill. For more information, see Enable ServiceNow Otto to generate wrap up code and notes summary.
2. Enable the AI interaction fields in the AI form section on the desired interaction wrap-up configuration record:
   - **Enable AI code**
   - **Enable AI notes**

   This feature can be configured for AI to determine the wrap-up code, generate the wrap-up notes, or both. For more information, see Create an interaction wrap-up configuration.
3. If desired, enable the **Use AI code as default** field.

   Enable this check box if you want to treat the AI recommended code as the default code if the timer expires. The system uses the AI recommended code in place of the code selected in the **Default wrap up code** field on the Codes tab.

System property

The *com.glide.interaction.auto_generate_ai_wrap_up* system property determines whether AI interaction wrap-up content is generated automatically or requires manual execution.

- If set to true: The system automatically generates content for the **Wrap up code** and **Wrap up notes** fields. The default setting for this system property is true (default setting).
- If set to false: The system displays the **Run** *ServiceNow Otto* button on the Wrap up modeless dialog. Agents can select this button to generate content for the **Wrap up code** and **Wrap up notes** fields.

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To locate this property, navigate to **All** > **System Properties** > **All Properties** and search for the property name.

Related topics

Create an interaction wrap-up configuration

Create interaction wrap-up codes

Enable interaction wrap-up codes

Use AI to generate wrap up code and notes summary

Organize records tabs with ServiceNow Link Manager

Use the ServiceNow Link Manager feature to manage and organize browser tabs within a ServiceNow instance.

The ServiceNow Link Manager feature is designed to enhance user productivity by managing and organizing browser tabs within a ServiceNow instance. This feature ensures that links opened within an instance are consolidated into a single workspace. It is supported on the latest versions of Google Chrome, Microsoft Edge, and Mozilla Firefox. ServiceNow Link Manager is useful for users who need to keep track of numerous open tabs during their workday.

Key features

ServiceNow Link Manager includes the following features:

- **Tab consolidation**: Automatically consolidates new ServiceNow-related tabs into an existing open ServiceNow tab, preventing browser clutter.
- **Cross-platform support**: Supports opening shared record links across environments such as Gmail, Microsoft Teams, Microsoft Outlook, and other web platforms linked to ServiceNow.
- **User-friendly interface**: Easy to enable and disable directly from the Chrome extension settings in the browser.

Frequently Asked Questions

FAQs for ServiceNow Link Manager

Question	Answer
What happens if I turn off ServiceNow Link Manager?	Turning off ServiceNow Link Manager reverts to the default behavior, where each clicked link opens a new tab.
Is the extension available on other browsers?	The extension is currently supported across multiple browsers - Google Chrome, Mozilla Firefox, and Microsoft Edge.
If I have several tabs open and then enable the ServiceNow Link Manager, what will happen?	The existing tabs remain unchanged. Any new links open within the most recent tab in your current workspace.
Can I choose which tabs to consolidate or does ServiceNow Link Manager automatically consolidate all ServiceNow tabs?	ServiceNow Link Manager automatically consolidates all ServiceNow-related tabs. There is currently no option available to select specific tabs for consolidation.
Does ServiceNow Link Manager affect my non-ServiceNow tabs?	No. ServiceNow Link Manager only affects ServiceNow-related tabs. Non-ServiceNow tabs continue to function as usual.

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FAQs for ServiceNow Link Manager (continued)

Question	Answer
Will ServiceNow Link Manager slow down my browser performance?	ServiceNow Link Manager is designed to operate efficiently without significantly impacting your browser's performance. However, if you experience any slowdowns, consider limiting the number of active extensions or tabs.
Can I temporarily disable ServiceNow Link Manager without uninstalling the extension?	Yes, you can easily toggle ServiceNow Link Manager on or off from the extension settings without uninstalling the entire extension.
If I am working with multiple ServiceNow instances, can I customize which instance ServiceNow Link Manager consolidates tabs into?	Currently, ServiceNow Link Manager consolidates tabs within each ServiceNow instance independently. If you have multiple instances open, the link will open in the most recently used instance.

Does the extension work with customized URLs or older browser versions?	ServiceNow Link Manager extension works only with base system workspace URL patterns and doesn't support customized URLs. It currently supports the following patterns:
	
	CSM workspaces:
	`"patterns": [ { "name": "cwf", "match": "https://*/now/cwf/*" },`
	
	ITSM workspace:
	`"patterns": [ { "name": "sow", "match": "https://*/now/sow/*" }`
	
	Note: The extension doesn't work on older browser versions that don't support Manifest V3. Make sure you're using the latest version of Google Chrome, Microsoft Edge, or Mozilla Firefox.

Open new cases in the same tab with ServiceNow Link Manager for Google Chrome

Follow the steps below to install, activate, and use ServiceNow Link Manager in Google Chrome.

Before you begin

Role required: admin

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Installing ServiceNow Link Manager

Procedure

1. Select the **Extensions** icon in Chrome browser and select **Manage Extensions**.
2. In the left panel, select **Chrome Web Store** to open it in a new tab.
3. In the search bar, type `ServiceNow Link Manager`.
4. Select the extension in the results and select **Add to Chrome**.
5. Once installed, the extension appears in your extensions list. It is enabled by default. You can toggle it to on or off as needed.

Activating ServiceNow Link Manager

Procedure

1. Select the ServiceNow Settings icon in the top-right corner of your Chrome browser.
2. From the drop down menu, locate the ServiceNow Link Manager toggle switch and turn it on.

Note: The ServiceNow Link Manager extension turns on automatically in CRM Workspace and ITSM Workspace. It doesn't run in other ServiceNow workspaces.

Using ServiceNow Link Manager

Links typically open in a new browser tab. When ServiceNow Link Manager is activated, links consolidate into an already open ServiceNow workspace tab. This consolidation applies whether the link is clicked within ServiceNow itself or from an external site such as Gmail, Microsoft Teams, or Microsoft Outlook.

Open new cases in the same tab with ServiceNow Link Manager for Mozilla Firefox

Follow the steps below to install and activate ServiceNow Link Manager in Mozilla Firefox.

Before you begin
Role required: admin

Installing ServiceNow Link Manager

Procedure

1. Select the **Menu** icon in Mozilla Firefox and select **Add-ons and themes**.
2. Open the **Add-ons for Firefox** site, search for `ServiceNow Link Manager`, and select **Add to Firefox**.
3. In the pop-up that appears, select **Add** to confirm installation.
4. Once installed, the extension appears in your add-ons list. It is enabled by default. You can toggle it to on or off as needed.
5. You can pin the extension to the toolbar for quick access.

Activating ServiceNow Link Manager

Procedure

1. Select the **Menu** > **Add-ons and themes** > **Extensions**.
2. Locate the **ServiceNow Link Manager** toggle switch and turn it on.

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Note: The ServiceNow Link Manager extension turns on automatically in CRM Workspace and ITSM Workspace. It doesn't run in other ServiceNow workspaces.

Using ServiceNow Link Manager

Links typically open in a new browser tab. When ServiceNow Link Manager is activated, links consolidate into an already open ServiceNow workspace tab. This consolidation applies whether the link is clicked within ServiceNow itself or from an external site such as Gmail, Microsoft Teams, or Microsoft Outlook.

Open new cases in the same tab with ServiceNow Link Manager for Microsoft Edge

Follow the steps below to install and activate ServiceNow Link Manager in Microsoft Edge.

Before you begin
Role required: admin

Installing ServiceNow Link Manager

Procedure

1. Select the **Extensions** icon in Microsoft Edge and select **Manage Extensions**.
2. Open the **Edge Add-ons** site, search for `ServiceNow Link Manager`, and select **Get**
3. In the pop-up that appears, select **Add** to confirm.
4. Once installed, the extension appears in your extensions list. It is enabled by default. You can toggle it to on or off as needed.
5. You can pin the extension next to the address bar for quick access.

Activating ServiceNow Link Manager

Procedure

1. Select **Settings and more** icon in the top-right corner and then **Extensions**.
2. Locate the **ServiceNow Link Manager** toggle switch and turn it on.

Note: The ServiceNow Link Manager extension turns on automatically in CRM Workspace and ITSM Workspace. It doesn't run in other ServiceNow workspaces.

Using ServiceNow Link Manager

Links typically open in a new browser tab. When ServiceNow Link Manager is activated, links consolidate into an already open ServiceNow workspace tab. This consolidation applies whether the link is clicked within ServiceNow itself or from an external site such as Gmail, Microsoft Teams, or Microsoft Outlook.

Activity timer log

The activity timer log feature automatically tracks the time that agents spend working on cases and interactions in CRM Workspace. The feature monitors agent activity, pauses when agents navigate away from records, and provides detailed time reports for project tracking.

Activity timer log overview

The activity timer log feature monitors agent activity and automatically tracks the time that agents spend working on case and interaction records. When the feature is active, agents can see the timer component in the record header. This component displays how much time has passed on the current record. The timer component can detect when an agent is actively working on a

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record and when the agent moves away from the tab. The timer automatically pauses when the agent navigates away from the tab and resumes when the agent returns to the tab.

Start and stop entries in the Time Entry table mark when an agent is actively working on a case or interaction.

- A start entry is created when an agent:
  - Creates a case or interaction
  - Opens a case or interaction
  - Returns to a tab in the workspace and continues working on a record.

    Note: This requires a manual page refresh. When an agent returns to a tab, the system displays the following message: "Time tracker is paused due to inactivity. Refresh the page to resume the timer."

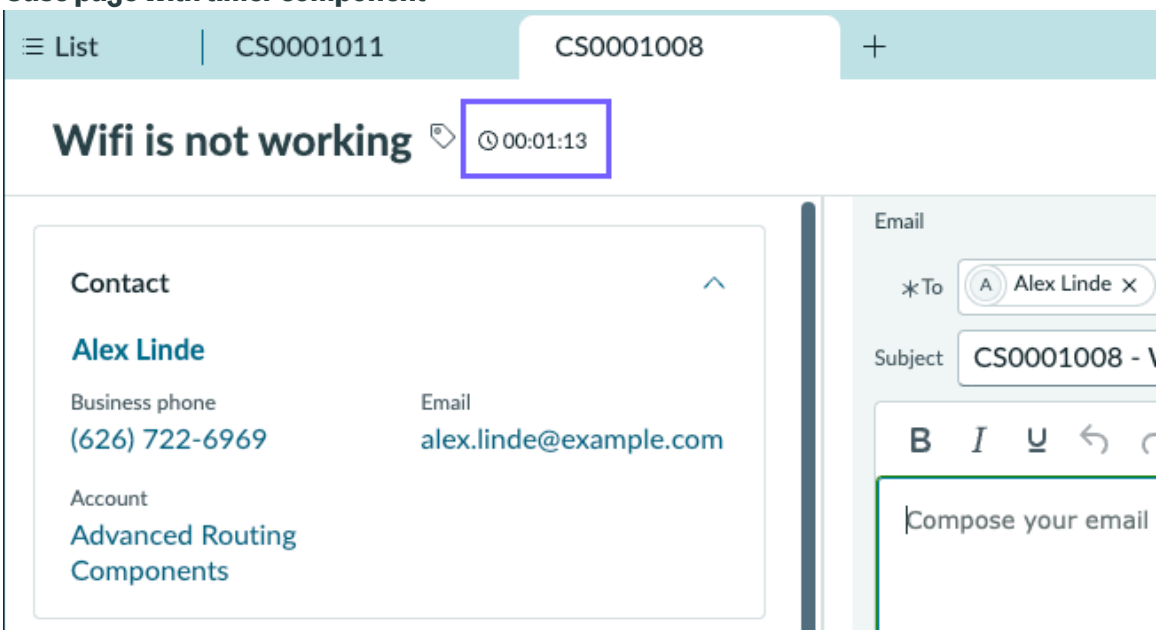
- A stop entry is created when an agent:
  - Leaves a tab in the workspace and selects another tab
  - Closes a case
  - Assigns a case or interaction to another user
  - Is inactive on the current tab for two minutes
  - Logs out

The Time Entry table stores the start and stop events and the time captured for each start and stop pair. The system runs a scheduled job every 24 hours that aggregates this information and stores it in the Time Entry Aggregated table. Agents can view this aggregated time data in the My Timelog list.

Timer component

When the system administrator configures the activity timer log feature, the timer component appears in the record header next to the short description. Agents can use this timer to view the time elapsed on a record.

Case page with timer component



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My Timelog list

For customer service agents and consumer agents, the List view in CRM Workspace includes the **Timelog** > **My Timelog** list.

- Select **My Timelog** to view records you have worked on. The entry for each record includes these fields:
  - User
  - Record
  - Record Type
  - Short Description
  - Start Time
  - End Time
  - Total Time Logged
    The **Total Time Logged** field displays the time worked for a **Start Time** and **End Time** pair. There can be multiple entries for a record.
- Select a record in the **Record** column to open the related record form.

The **My Timelog** list includes these default filter conditions:

- Start and end time: Yesterday's data appears by default.
- User: The current logged-in user. Agents can only view their own data.

Agents can filter and sort the information in this list to see different views. For example, agents can view all of the entries for a single record or the total time worked on a record. For more information, see the table descriptions in Activity timer log components.

Plugin

The activity timer log feature is available with the Activity Timer Reporting application. This application has a dependency on the Activity Timer application.

Note: Activate the activity timer log feature before use. It is not active by default.

For more information about activating the plugin and configuring this feature, see Configure the activity timer log.

Record pages with the activity timer log feature

The activity timer log feature is available on these record pages in CRM Workspace:

- CSM default record page
- Front-line case page
- CSM Interaction record page
- Email interaction record page
- CSM voice interaction record page
- CSM centered chat interaction record page

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Activity timer log components

The activity timer log feature is available with the Activity Timer Reporting plugin (sn_activity_timer_reporting). This plugin adds user tables, user roles, UI Builder page properties, a script include, and a scheduled job.

Tables

The activity timer log feature adds the following tables.

Activity timer log tables

Table	Description
Time Entry [sn_at_time_entry]	Records the time that an agent spends working on case and interaction records. Each start and stop transaction has a time associated with it.
Time Entry Aggregated [sn_at_time_entry_aggregated]	Aggregates the data stored in the Time Entry table. This aggregation records the time spent per case, agent, and record type.

Time Entry [sn_at_time_entry] table

Field	Description
Attributes	Attributes for the entry, such as the record state and short description.
Record	The record type and number. For example, Case: CS0001008.
Session	The session ID.
Source	The record page that the agent was using in CRM Workspace.
Table	The table that stores the record in the **Record** field.
Timer running	The start and stop times for the entry.
Timestamp	The timestamp for the start and stop times.
Transaction	The transaction ID for a start/stop pair.
User	The name or role of the user who worked on a record.

Time Entry Aggregated [sn_at_time_entry_aggregated] table

Field	Description
User	The name or role of the user who worked on a record. This is a reference to the sys_user table.
Record	Record number.
Record Type	Record type, such as case or interaction.
Short Description	Short description of the record.
Start Time	Time that the agent started working on the record.
End Time	Time that the agent stopped working on the record.

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Time Entry Aggregated [sn_at_time_entry_aggregated] table (continued)

Field	Description
Total Time Logged	Total time that the user spent working on the record, displayed in the following format: • In seconds for durations under a minute • In minutes for durations of one hour or less • In hours and minutes for durations of more than one hour

Note: Data in the Time Entry Aggregated table is automatically deleted 31 days after it is created.

User roles

The activity timer log feature adds the following user roles:

- sn_at.admin
- sn_at.agent

Script include

The `TimeTrackerAggregator` script include:

- Runs every 24 hours and records all the transactions from the Timer Entries table.
- Is invoked by the `Activity Timer Reporting Aggregator` scheduled job.
- For each record, calculates the time between each start and stop on the record.

Scheduled job

The *`Activity Timer Reporting Aggregator`* scheduled job runs once every 24 hours and generates a report. It creates an aggregation of the records stored in the Time Entry table and stores this data in the Time Entry Aggregated table. The aggregated data is displayed in the agent's My Timelog list view.

Page properties

The activity timer log feature adds the following UI Builder page properties:

Activity timer log page properties

Property	Description
`activity_timer`	Enables the activity timer component in the workspace. • True: Activity timer is active. • False: Activity timer is inactive.
`activity_timer_custom_tables`	Specifies custom tables for the activity timer log feature.
`activity_timer_case_types`	Specifies case types excluded from the activity timer log feature.

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Customer Central

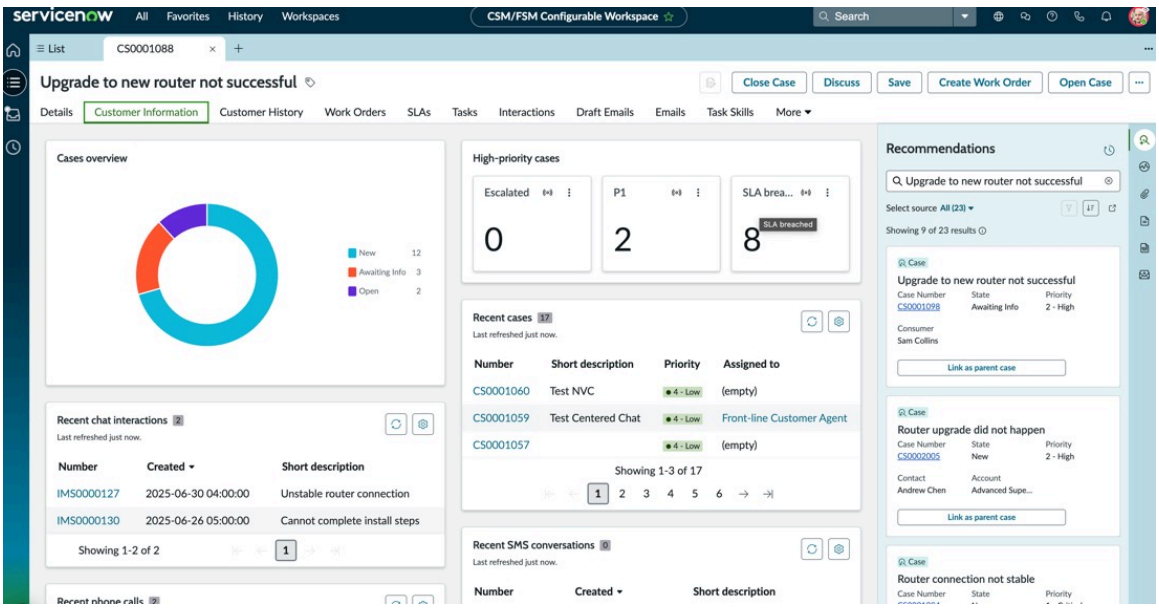
Customer Central provides customer service agents with all the information about the customer in one central place. It enables them to quickly zoom in on the customer issues and provide efficient and supportive service to their customers.

Customer service agents or location agents can view customer central on the interaction, case, account, contact, or consumer records in CRM Workspace in the form of two views: Customer Information and Customer History.

Starting with the Yokohama release, the Customer History component displays customer activity information on some record pages in CRM Workspace.

Customer Information view

The Customer Information view displays key information about the customer and a view of all recent customer touch points with the service organization. It contains a number of predefined lists, records, reports, and report groups that are highly configurable, or you can create your own. You can also configure the number of days to display the data for.



Customer History view

The Customer History view displays all the recent customer touch points with the service organization in the form of an activity feed. If the Enable facets check box is selected in UI Builder, facets appear on the left-hand side. Otherwise, a filter icon is displayed. The data in the activity feed is displayed based on the facet or filter you select. It contains a number of predefined categories and activities that are highly configurable, or you can create your own. You can also select a date range to display the data for.

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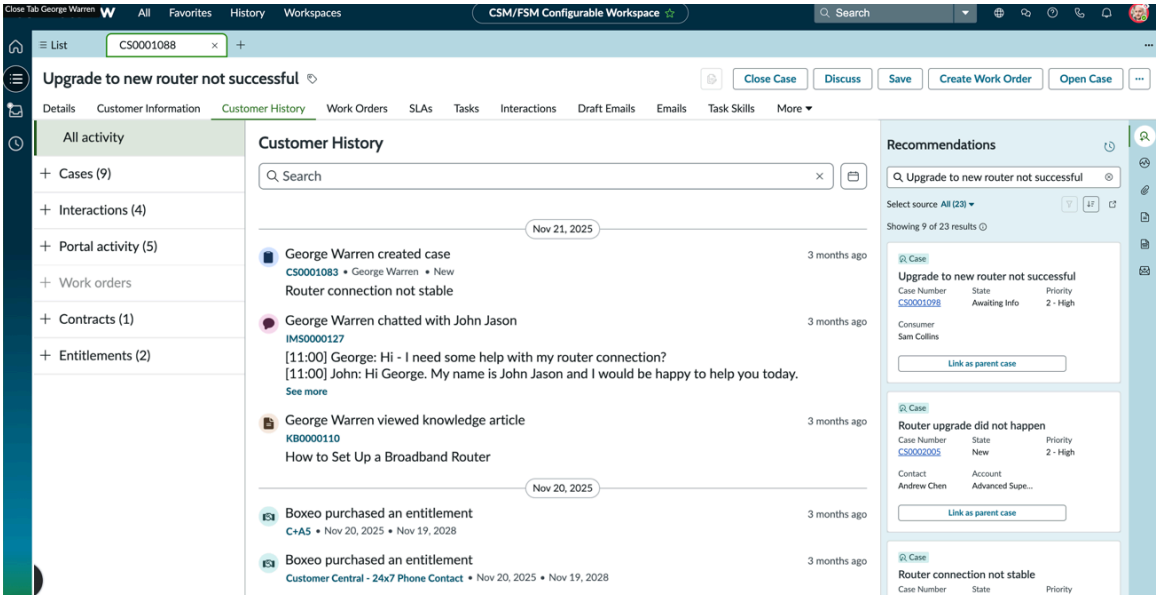


Chat summarization

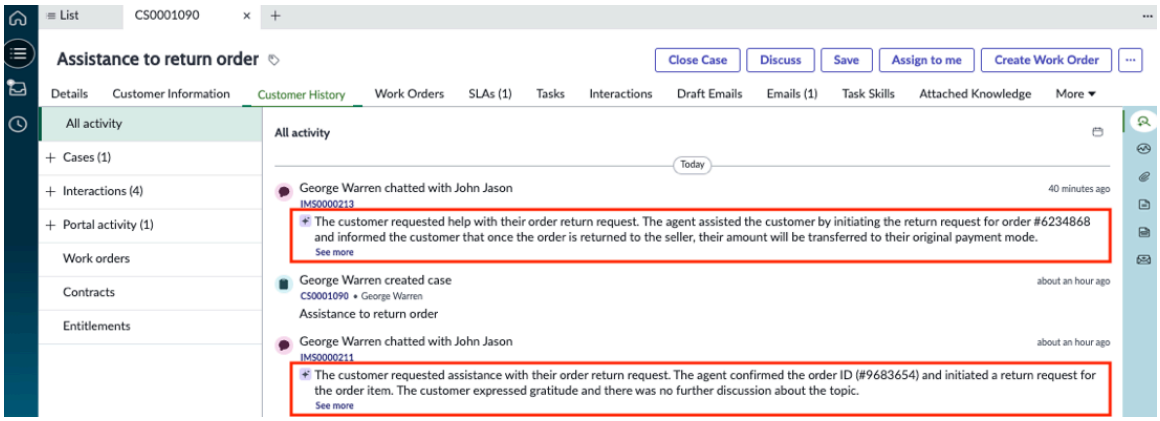
Agents can see an AI-generated chat summary instead of a full transcript so that they can quickly understand the past interaction and resolve a customer issue. An interaction chat summary in the Customer History tab provides the context about the chat conversation between the agents and customers.

An AI icon and tooltip are displayed before the summary which indicate that the summary is generated by Now Assist.

This feature has the following dependencies:

- ServiceNow Otto for CSM (sn_csm_gen_ai)
- UXC Generative AI (sn_uxc_gen_ai)

When these plugins are not installed or the chat summary is unavailable, agents can see the entire conversation transcript to access the chat history.



Customer History component

The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component displays the information previously displayed in the Customer Activity tab.

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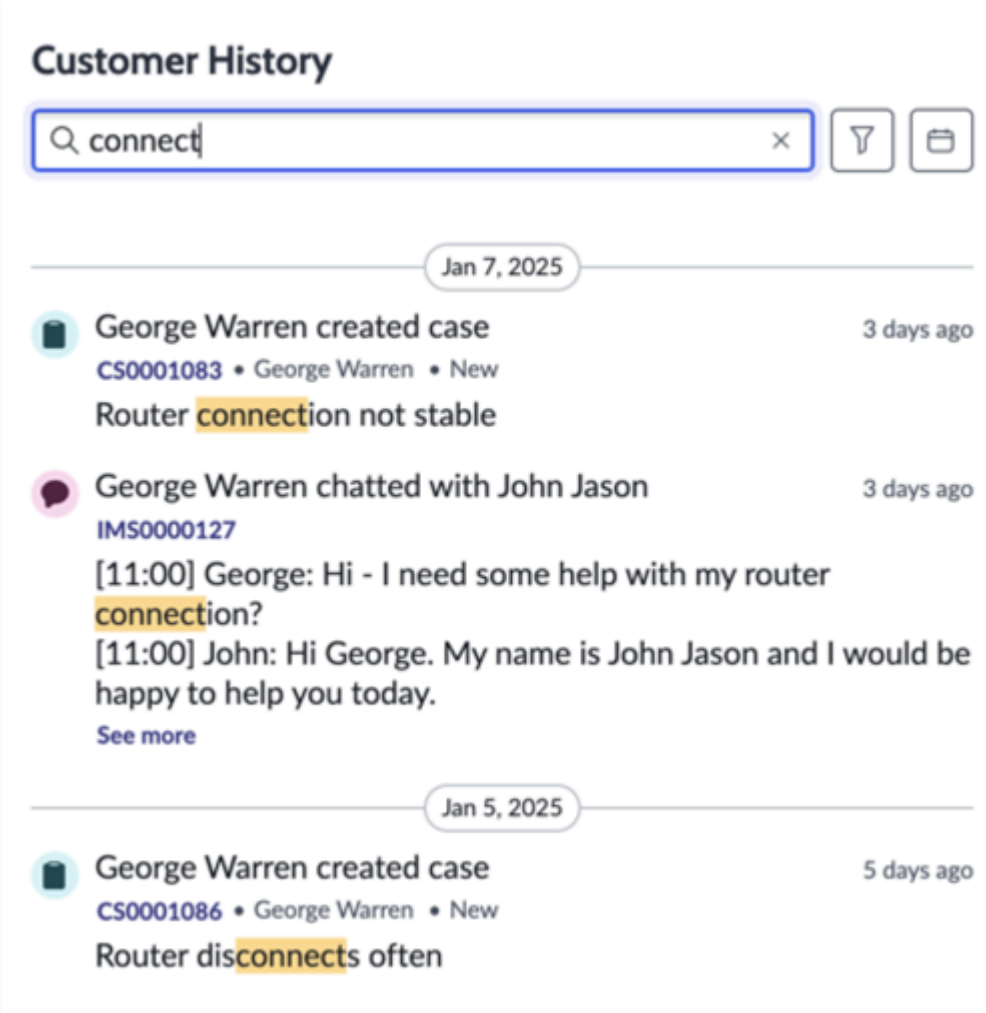

The Customer History component includes the Customer tab. This tab displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab includes a search field, filter, and date range selector that agents can use to find specific information in the history.

The Customer History component is available on the following record pages in CRM Workspace:

- Front-line case page: Appears in the contextual side panel.
- CSM voice interaction record page: Appears in the left pane.

Users with the system administrator role can add this component to a record page in UI Builder and configure the component properties.

The Customer History component can be configured to display a **Call Transcript** tab. This tab displays the text of the live call transcript when a conversation record is present for the interaction.

Note: The Call transcript tab is visible to users if configured in the provider application associated with the interaction.

- This tab displays the text of the call transcript when a conversation record is present for the interaction.
- This tab displays the following text when a conversation record is not present for the interaction record: Call transcript not available yet.

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The Call transcript tab is visible to users if configured in the provider application associated with the interaction.

For more information about the Customer history component, see the following topics:

- Customer History component features
- Configuring the Customer History component
- Next Experience Components documentation

Customer Central plugin

The Customer Central application (com.sn_csm_customer_central) is activated with the CRM Workspace application (com.snc.uib.csm_agent_workspace). The CRM Workspace application is activated with the Case Management Core plugin (com.sn_customerservice).

Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) has moved to the ServiceNow Store. Any new enhancements to this application are delivered through the Customer Central store app.

Request apps 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.

Related topics

Configure Customer Central

Use Customer Central

Customer History component features

Customer service agents can use several features in the Customer History component to view customer, consumer, or account history information.

Search

The Search icon introduces keyword-based search functionality enabling agents to retrieve activities such as interactions, cases, and work orders by entering keywords or partial matches.

- By default, the search bar is hidden. Select the search icon to show or hide it.
- Admins can configure a toggle option to have the search bar open by default when the page loads.
- Agents can enter a keyword or partial match to find relevant results. For example, entering `connect` displays cases with terms like connect, connected, or connection.

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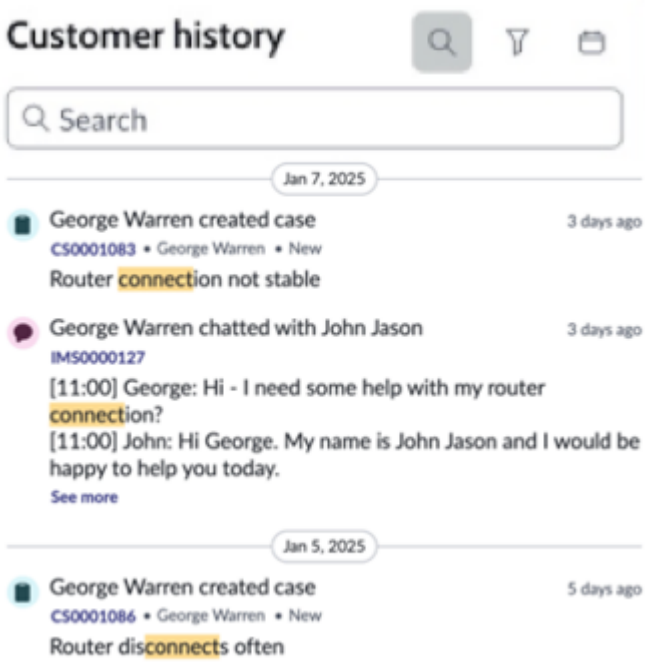

Filter

Agents can use the filter icon next to the search bar to quickly filter and view relevant case data. Selecting the filter icon displays the results in the Customer History component.

Facets have been replaced by a filter icon. If the **Enable facets** check box is selected in UI builder, the system displays facets on the left of the CSM voice interaction record page. If this check box is not selected, the system displays a filter icon. Selecting the filter icon displays the selectable facets.

When an agent selects a facet:

- The selected facet name appears below the search bar and the system displays the current results.
- Selecting a new facet replaces the current results with the new facet's results.
- Only one facet can be selected at a time.

Note:

- For new customers: Filter icons are displayed by default.
- For existing customers: Facets or filters appear based on screen size.

Customer History access

Starting with the Yokohama release, the Front-line case page includes the Customer History component. This component ensures that agents can easily view customer details without navigating away from the case page.

Select the **Customer History** tab in the contextual side panel to access customer history.

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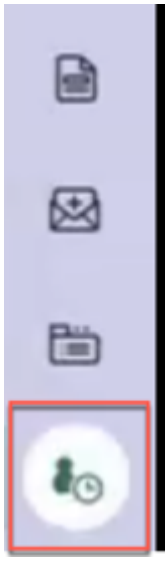
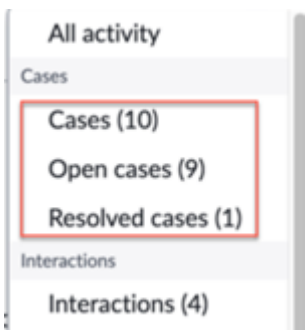


Cases facet

The Cases facet has been updated to improve case categorization for agents. This helps agents quickly filter the cases based on their status directly within the Customer History component.



The facet is divided into two subcategories:

- Open Cases
- Resolved Cases

Resizable layout blocks

The **Resizable Layout Blocks** feature enables agents to adjust the size of page panel for better visibility. Agents can resize any block (left, center, or right) by following these steps:

1. Click the edges of the block.
2. Drag to adjust the size as needed.

This feature is available across record pages in CRM Workspace and enables agents to optimize their workspace based on their needs.

Real-Time updates in Customer History

The Customer History view updates in real time. When an agent adds a new case or interaction, a new activity is created. If another agent has the same customer record open, the view automatically refreshes to show the new activity. You don't need to refresh the page manually.

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Note:

- The view refreshes only for new activities created in the [sn_actsub_activity] table that are linked to the currently open customer record.
- Changes to existing records or knowledge articles don't trigger a refresh.
- The view updates only for the specific record that you're viewing. For example, if you're viewing a contact, updates to the associated account won't appear unless you open the account record directly.
- Real-time updates are supported only on the Front-line case page and CSM default record page.

Filter activities by time

Agents can use the date range icon to filter customer activities by day, month, quarter, or year-based on the configuration set by the admin. The date range icon appears next to the search bar:

- If Day is configured, select a specific date to view activities for that day.
- If Month, Quarter or Year is configured, activities appear grouped by the selected time. The activity list updates based on the selected filter.

Configuring the Customer History component

Users with the admin role can configure several properties for the Customer History component.

Refresh requested

The Customer History component refreshes automatically, eliminating the need for manual page refreshes.

The **Refresh requested** UI Builder property captures the last refresh timestamp and triggers events such as Context Refresh Requested whenever the value changes. Admins can configure custom event handlers to adjust the refresh behavior as needed.

This property can be set for the following record pages:

- Front-line case page
- CSM default record page

To configure this property on the Front-line case page:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. Open the Front-line case page.
4. Select the **Customer History** component.
5. Navigate to the Properties panel.
6. Capture the last refresh timestamp by enabling the **Refresh Requested** property.
7. Customize the refresh behavior by adding or modifying event handlers under the Events tab.

To configure this property on the CSM default record page:

1. Select **Customer Central**.
2. Open the Customer history section.
3. Navigate to the Properties panel.

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4. Capture the last refresh timestamp by enabling the **Refresh Requested** property.
5. Customize the refresh behavior by adding or modifying event handlers under the Events tab.

Header title

The Customizable Customer Activity Title feature enables admins to rename the **Customer History** title directly from the interface.

To change the title:

1. In the right navigation pane, navigate to the **Component visibility** settings.
2. Change the title according to user preferences by editing the **Header title** property.

This customization option is available on all pages where the Customer History component is used.

Show bordered icons

The **Show bordered icons** check box enables admins to customize icon borders in the interface.

- Set to true: Enables bordered icons
- Set to false: Disables bordered icons

Show bordered icons check box

Admins can adjust this setting based on their preferences.

Page design

The Page Design feature introduces a drag-and-drop interface for easier customization of page layouts. Admins can add, position, and resize components directly on the page without using tabs.

To use this feature:

1. On the left navigation pane, select **+Add Content**.
2. In the toolbox window that appears, enter `Customer history component` and then select and drag it.

The Customer History component is now available in the toolbox.

Presets

Admins can choose from two new presets for the Customer History component on the Front-line case page to better manage how customer data is displayed.

- Customer history for record page with lazy load
- Customer history for record page

To apply a preset:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.

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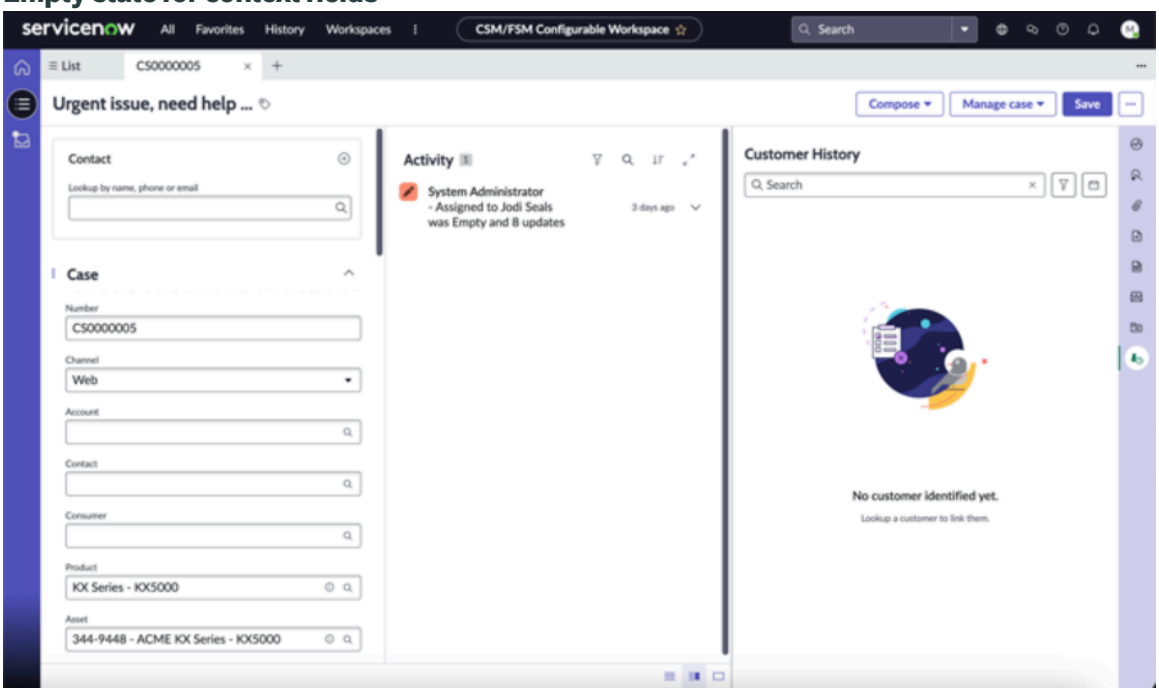
3. Open the Front-line case page.
4. Select the **Customer History** component.
5. Select the existing preset in the configuration panel.
6. In the Select a preset window, choose **All** under **Controller** to view available presets.
7. Select one of the new presets to update how customer activity is displayed.

Default values are set for all fields to help prevent errors by ensuring that fields are never left null or empty.

Empty state for context fields

Empty state for context fields



On the agent side, when viewing a case, customer history or activity data loads automatically if available. If there's no activity, the system shows `No activities found`. If no account, contact, or consumer is selected, it displays `No customer identified yet`. This behavior is part of the empty state feature, guiding users to select or add context (account, contact, or consumer) to proceed.

Admins can now configure cases to handle scenarios where customer contact or name fields are empty. Instead of leaving the fields empty, the system prompts users to add the relevant account or contact information.

Show with activity creation date

The **Show with activity creation date** property, available in UI Builder, enables admins to control how timestamps are displayed in the Customer History tab.

- When enabled: Both the timeline and side timestamp display the activity creation date. For example, if a record (such as a case or interaction) was created 10 days ago but updated today, both will show today's date.
- When not enabled (default behavior): Both the timeline and side timestamp display the original record creation date. So, in the same example, the record would continue to show as being created 10 days ago, even if it was updated today.

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Activity time period

The **Activity time period** field in the Customer History component enables admins to define how customer activities are grouped for agents in CRM Workspace. By default, activities appear by day, but you can change this to group them by quarter or by year.

To configure the filter in the Front-line case page:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. Open the Front-line case page.
4. Select the **Customer History** component.
5. Navigate to the Properties panel.
6. From the Activity time period drop-down, select one of the following options:
   - **Day**: Enables an additional field where you can enter a date in `DD:MM:YYYY` format.
   - **Monthly**: Groups activities by month.
   - **Quarter**: Groups activities by calendar quarter.
   - **Year**: Groups activities by calendar year.

To configure this property on the CSM default record page:

1. Select **Customer Central**.
2. Open the Customer History section.
3. Navigate to the Properties panel.
4. From the Activity time period drop-down, select one of the following options:
   - **Day**: Enables an additional field where you can enter a date in `DD:MM:YYYY` format.
   - **Monthly**: Groups activities by month.
   - **Quarter**: Groups activities by calendar quarter.
   - **Year**: Groups activities by calendar year.

Lookup and verify

The lookup and verify feature enables customer service agents to quickly look up contacts or consumers using information such as the name, phone number, or record number.

This feature simplifies the process of looking up and verifying contact or consumer information. Agents can use it as follows:

- If an interaction record is already populated with contact or consumer information from a chat or phone call, the agent can review the information and confirm that it is correct.
- If no customer or consumer information is available, the agent can search for this information, select and confirm the information. and populate the interaction record.

Note: If this information has already been verified, such as through a customer portal login or authentication by Virtual Agent or by an IVR, the **Verified** check box on the interaction record is checked.

Agents can access the search window on the interaction record by selecting the Verify Contact icon ( ) or the Verify Consumer icon ( ) in the contextual side panel.

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Agents can perform a type-ahead search across multiple configurable fields such as name, phone number, email address, and record number. From the search results list, agents can select a result to display detailed information for the contact or consumer in a verification card. Once verified, the system adds the information to the interaction record and checks the **Verified** check box.

Plugins

The lookup and verify feature is included with the Case Management Core (com.sn_customerservice) plugin. This plugin provides the configuration for contact and consumer lookup as well as **Lookup Contact** and **Lookup Consumer** UI actions that can be added to the interaction record in CRM Workspace.

Note: These actions are not enabled by default. The workspace admin can enable these actions as part of the lookup and verify feature configuration.

Contact and consumer configurations

Two lookup and verify configurations are provided with the feature, one for contacts and one for consumers. Navigate to **Workspace Experience** > **Lookup and Verify** > **Configuration** to access the Lookup and Verify Configurations list.

Note: To see the contact and consumer lookup and verify configurations, you must activate the CRM Workspace Lookup and Verify plugin (com.snc.uib.lookup_verify).

For each configuration, the workspace administrator can:

- Enable the configuration and display the related UI action on the interaction record.
- Enter the minimum number of characters to start the type-ahead search.
- Enter the maximum number of search results returned.
- Select the primary and secondary fields to include in the search results.
- Select the fields to display on the verification card.
- View the lookup tables.

Note: Customers can contact ServiceNow to make changes to the search fields.

Using Lookup and verify in CRM Workspace

Agents can use the lookup and verify feature to search for contact or consumer information in the contextual side panel.

The search field provides type ahead search that displays results in a list and narrows the results as more characters are entered. Selecting a result from the list displays more detailed information about the contact or consumer in a verification card.

The search feature searches multiple configured fields such as name, account, phone number, and record number.

- For phone numbers and record numbers, it uses an "exact match" search.
- For other fields, it uses a "starts with" search.

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Verification cards

After selecting a search result, detailed information about the contact or consumer is displayed in a verification card. From this card, the customer service agent can review and confirm the information by clicking **Verified**.

Tables

The lookup and verify feature uses the following tables:

- Lookup and Verify Configurations (sn_lookup_verify_config)
- Lookup Tables (sn_lookup_verify_search_on_table)

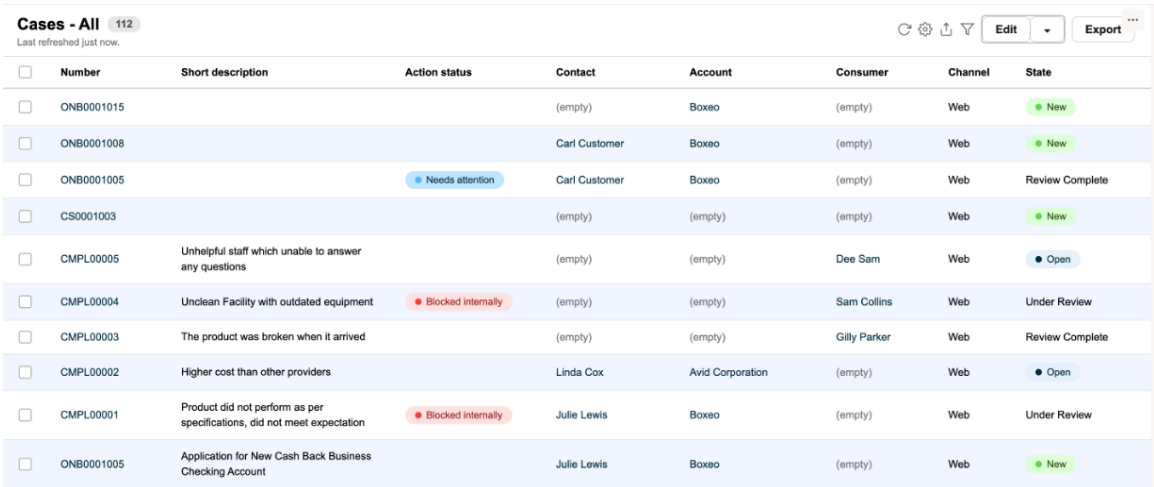
Related topics

Look up and verify a contact or consumer

Case action status

The case action status feature displays the status of cases in the Case list. With this feature, customer service agents can easily identify cases that need attention.

Action status column on the Case list



Cases - All 112

Last refreshed just now.

Edit | Export

Number	Short description	Action status	Contact	Account	Consumer	Channel	State
ONB0001015			(empty)	Boxeo	(empty)	Web	New
ONB0001008			Carl Customer	Boxeo	(empty)	Web	New
ONB0001005		Needs attention	Carl Customer	Boxeo	(empty)	Web	Review Complete
CS0001003			(empty)	(empty)	(empty)	Web	New
CMPL00005	Unhelpful staff which unable to answer any questions		(empty)	(empty)	Dee Sam	Web	Open
CMPL00004	Unclean Facility with outdated equipment	Blocked internally	(empty)	(empty)	Sam Collins	Web	Under Review
CMPL00003	The product was broken when it arrived		(empty)	(empty)	Gilly Parker	Web	Review Complete
CMPL00002	Higher cost than other providers		Linda Cox	Avid Corporation	(empty)	Web	Open
CMPL00001	Product did not perform as per specifications, did not meet expectation	Blocked internally	Julie Lewis	Boxeo	(empty)	Web	Under Review
ONB0001005	Application for New Cash Back Business Checking Account		Julie Lewis	Boxeo	(empty)	Web	New

Action status column

The case action status feature provides visual indicators in the **Action status** column on the My Cases and My Open lists to highlight case status. In addition to the colored indicators, the **Action status** column also displays a brief status message.

Action status column indicators and messages

Indicator	Status message	Description
Blue	Needs attention	A blue indicator highlights cases that need attention, such as cases that have been updated by customers or internal users and are waiting for input or review.

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Action status column indicators and messages (continued)

Indicator	Status message	Description
Red	• Blocked internally • Blocked by customer • Blocked internally and by customer	A red indicator highlights cases that are blocked, such as cases that have open related task records or are waiting for customer feedback.

Actionable case flows

The case action status feature uses actionable case flows to automatically determine the action status for customer service cases. These flows create and resolve blocking tasks for different case-related actions and update the action status indicators. Certain agent actions trigger these case flows, which in turn create and resolve the blocking tasks. Customer service agents and managers can also manually set the action status for cases by enabling the **Needs Attention** field on the Case form.

For more information, see the following topics:

- Actionable case flows
- Configure actionable case flows

Blocking tasks

A blocking task is something that prevents an agent from making progress toward case resolution. For example, a case might have one or more open related case task records or be waiting for customer feedback.

Certain agent actions trigger case flows that create and resolve blocking tasks for customer service cases. These tasks determine the case action status. Additionally, there are actions that resolve these blocking tasks, such as the customer responding to an agent's question or an internal user resolving a problem task. For more information, see Blocking tasks.

Blocked by related list

The case action status feature adds the **Blocked by** related list to the workspace view of the Case form. Blocking tasks for a case appear in this list. When the system adds a blocking task to a case, it also adds one of the following blocking reasons:

- Need information from the customer
- Need task resolution
- Need PRB workaround
- Other

Note: When a problem is associated with a case, the blocking reason is set to **Needs task resolution**. The agent can update this reason to **Need PRB workaround** if necessary.

When a blocking task is resolved:

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- The **Unblocked By** field displays the user who performed the unblocking action.
- The **Unblocked On** field displays the date that the blocking task was resolved.
- The **Needs Attention** field for the case is enabled.

Notifications

Agents can receive notifications on their preferred channel when a blocking task for an assigned case is resolved. Agents can also receive notifications when the **Needs Attention** field for an assigned case is enabled.

Note: Notifications aren't sent to the user who updated the record.

Users with the admin role can configure notification triggers by navigating to **Workspace Experience** > **Administration** > **Notification Triggers** and selecting **Case Action Status** from the list.

Related topics

Configure case action status

Administering case action status

Third-party data integration for CSM

The third-party data integration feature enables you to retrieve data from third-party applications and display the data in Agent Workspace for CSM without having to store it in your ServiceNow instance.

Many enterprise customers use ServiceNow applications as part of their IT ecosystems. In these environments, ServiceNow applications coexist with other applications and exchange data through different types of integrations. For customer service agents who typically use a wide variety of applications, this can create a fragmented experience that impacts agent productivity and increases customer wait time.

A frequent integration takes place between ServiceNow and Salesforce applications. In this integration, customers use Salesforce to manage pre-sales activities and ServiceNow to manage post-sales activities. These post-sales activities represent service assurance.

To provide high quality service, agents using the Customer Service Management (CSM) application need a complete understanding of the customer's context, and this includes access to customer data maintained in other systems. A common example of this integration is enriching a CSM customer profile by providing a list of opportunities related to the customer's account. These opportunities are retrieved from Salesforce in real time and are presented in Agent Workspace for CSM.

Using the third-party data integration feature, data from third-party applications can be retrieved as needed. Agents can view the data in lists and forms. This feature uses remote tables to store the third-party data in memory on the application server. Remote tables are useful for data that changes frequently because the data is retrieved in real-time when a user accesses the data from the ServiceNow AI Platform.

Activating third-party data integration

The following plugins are required to implement third-party data integration:

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- Remote Tables (com.glide.script.vtable): Adds the Remote Table Script Definition table (sys_script_vtable) and adds the **Remote Table** flag to the Tables (sys_db_object) table. Active on the base instance.
- OAuth 2.0 (com.snc.platform.security.oauth): Adds the OAuth-related tables and extension points needed to support **OAuth 2.0 –JWT Bearer grant type**. Active on the base instance.
- IntegrationHub (com.glide.hub.integrations): Provides the ability to build reusable integrations with third-party systems and call them from anywhere in the platform. IntegrationHub requires subscription and is available in several subscription packages. Different packages allow for different levels of automation and provide different subsets of predefined third-party integrations, or spokes. For more information, see Request IntegrationHub and IntegrationHub available spokes.
- Case Management Core (com.sn_customerservice)

Configuring third-party data integration

Users with the system administrator role can configure the necessary components to enable third-party data integration for Agent Workspace for CSM. At a high level, the configuration steps include:

- Setting up the **OAuth 2.0 – JWT Bearer grant type**, which provides the connection between the ServiceNow instance and the third-party application.
- Setting up aliases to manage connection information and credentials when integrating with external systems and providing alias reference to the IntegrationHub action.
- Creating a remote table to store the third-party data.
- Creating a remote table script definition that maps the data from the third-party application table to the remote table.
- Configuring ACLs for the remote table to provide user access to the third-party data.
- Configuring the lists and forms that display data from the remote table.

For more information, see Configure third-party data integration for CSM.

Using third-party data integration

Within Agent Workspace for CSM, agents can use this feature to:

- View read-only data from third-party applications in lists and forms.
- View data from multiple third-party applications in one browser tab.
- View data from third-party applications in pop-up windows, sub tabs, and related items using iframes.
- Open links to third-party application records from forms.

Domain separation

Remote table script definitions are domain separated. If users do not have access to the same domain as the remote table script definition record, they cannot access records from the remote table specified in the script definition.

The data within the remote table is not domain separated.

For more information, see Domain separation and remote tables.

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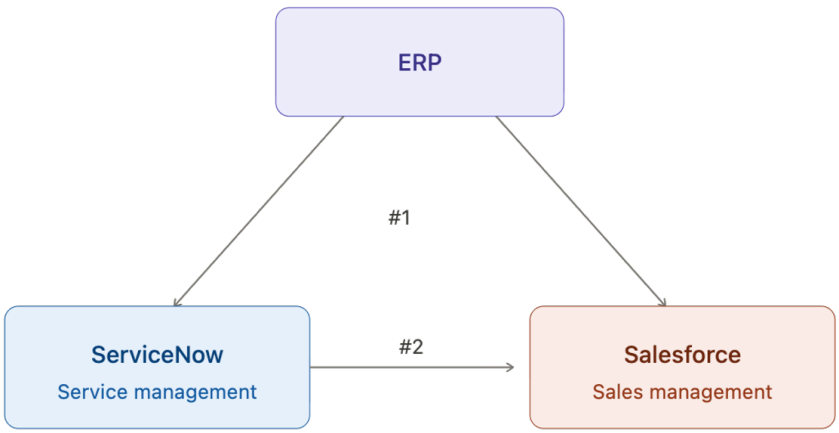
Related documentation

- Authentication and credentials
  - Set up OAuth provider with JWT Bearer grant type
  - Credentials and connection information
- IntegrationHub
- Flow Designer
- Retrieving external data using remote tables and scripts
- Salesforce spoke

Third-party data integration solution overview

A typical enterprise ecosystem includes enterprise resource planning (ERP), sales management, and service management systems. There are multiple options for implementing the integrations between these systems.

In this example, the ERP system manages customer data (for example, Accounts).



When a new account is acquired, it is created first in the ERP system and then account data is transferred to Salesforce and ServiceNow (1).

During this process, new accounts are created in Salesforce and ServiceNow. The ServiceNow account record is updated with the Salesforce account ID attribute that holds the reference to the Salesforce account record. The Salesforce account ID is later used to match account records between ServiceNow and Salesforce and also to retrieve opportunity data from Salesforce.

When an agent accesses an account in Agent Workspace for CSM, a list of related opportunities for this account is retrieved from Salesforce in real-time and presented to the agent.

This example assumes that the flow has been implemented and executed and that the ServiceNow account records contain valid Salesforce account IDs. This example also uses the following configuration:

- Connectivity between a ServiceNow and Salesforce.
- Integration using Integration Hub and remote tables.

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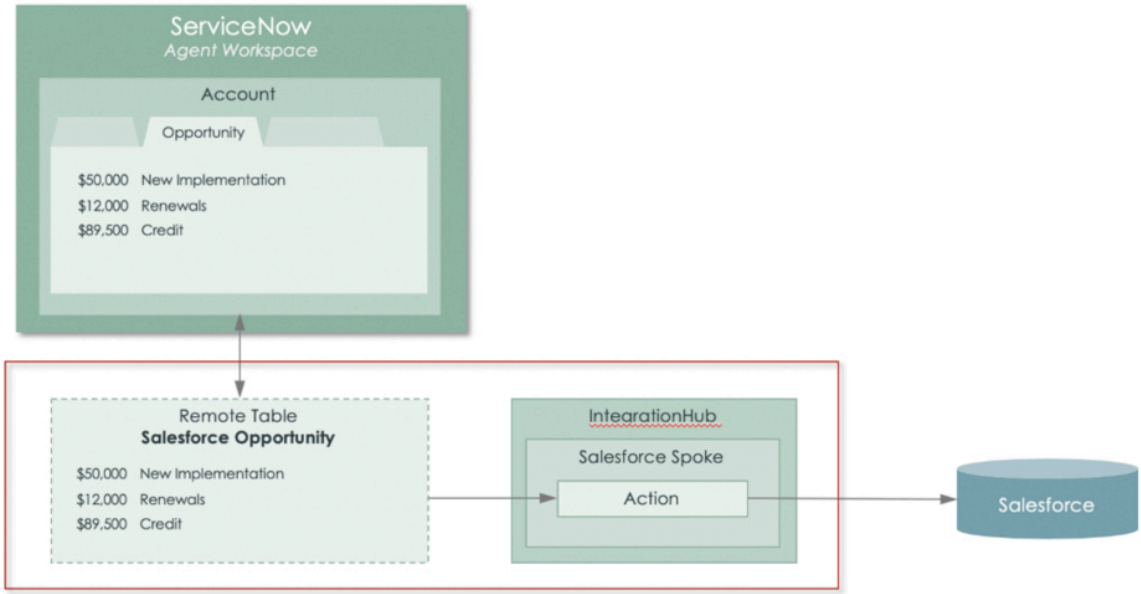
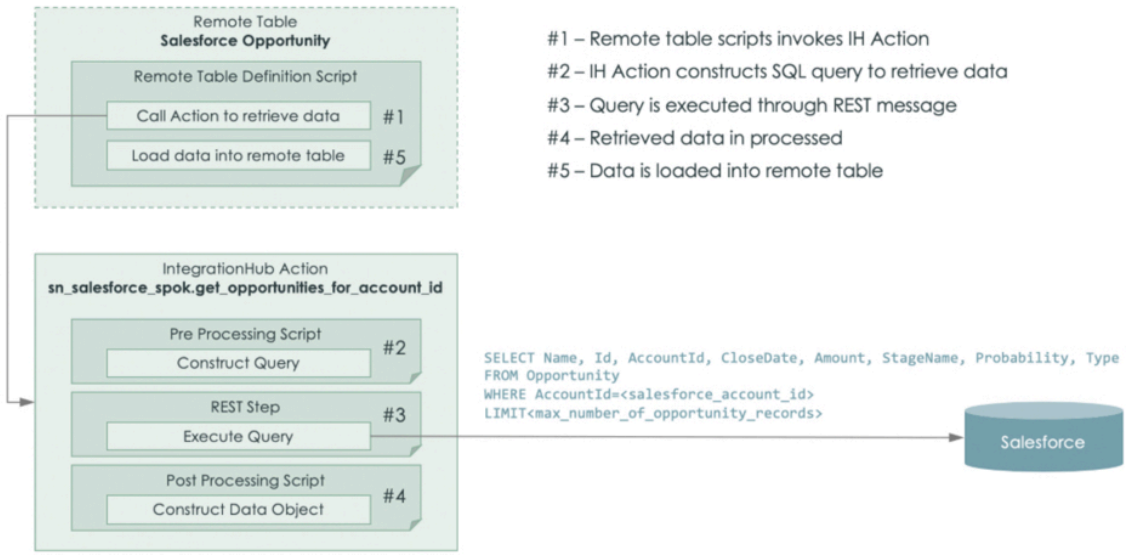
Integration architecture

ServiceNow integrates with Salesforce through the OAuth 2.0 Bearer Token Flow.

Integration architecture



Remote tables and IntegrationHub architecture



Third-party data integration components

These components require configuration by the system administrator to use third-party data integration with Agent Workspace for CSM.

OAuth 2.0 –JWT Bearer grant type

JWT Bearer is the OAuth 2.0 grant type supported for the third-party data integration feature. It allows server-to-server API interactions between the ServiceNow instance and external API providers without requiring any user intervention.

The third-party application admin is used as the subject claim of the JWT that the ServiceNow instance creates and passes to the third-party application instance. This is done to get the

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access token which is used to make the REST API call to fetch records from the third-party application table.

Credentials and connections

IntegrationHub takes advantage of aliases to manage connection information and credentials when integrating with external systems. Using an alias eliminates the need to configure multiple credentials and connection information profiles when using multiple environments. IntegrationHub only requires an alias, which then resolves to use the correct credentials and connection information during runtime.

For more information, see the following topics:

- Introduction to credentials, connections, and aliases
- Create connection attributes for IntegrationHub

Remote tables

The Tables (sys_db_object) table contains a record for each table in the database, including remote tables. For remote table records, the **Remote Table** flag is checked on the record form.

The columns in a remote table are mapped to the columns in a third-party application table from which the data is being pulled. The remote table script definition stores this information. Table definitions for remote tables reside on the ServiceNow AI Platform. The table rows, or external records, are stored in memory while a user views the data in a list or form.

For more information about remote tables, see Create a remote table.

When creating a remote table for use with IntegrationHub, pay special attention to the caching interval and choose an interval based on your workflow and the volatility of the third-party data. If the caching interval is too short, this can result in unnecessary connections to the third-party application. If the caching interval is too long, this can result in out-of-date third-party data being presented in Agent Workspace for CSM.

Remote table script definitions

Use a script definition to retrieve and cache data for a remote table by running the script against an external data source. Remote table script definitions store the following information:

- Name
- Active
- Table
- Script
- Cache TTL
- Domain
- Domain path

For more information about script definitions, see Create a script definition for a remote table.

Third-party data integration sample remote table script

The remote table script can be designed to pull records from a third-party application. This script is called when a query to access data in the remote table is made.

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In order to use a remote table with IntegrationHub, you need to identify the IntegrationHub spoke that works with the third-party application. The spoke consists of the Flow Designer actions that were created to bring various subsets of the data from that application.

For example, if you need to bring account information from the Salesforce application, you would use the Salesforce spoke and the **Get All Accounts** action. See below for an example of the remote table script that accesses this action.

```
(function executeQuery(v_table, v_query) {
  try {
    // prepare inputs for the spoke actions
    // Get All Accounts action does not have any inputs).
    var inputs = {};

    // call spoke action
    var outputs = sn_fd.FlowAPI.executeAction(

 "sn_salesforce_spok.get_all_accounts", inputs);

    // check if Action was completed successfully
    if (outputs.status != "Success") {
      throw new Error(outputs.errorMessage);
    }

    // extract payload from the action outputs
    var accounts = outputs.accounts.data;

    // map action output data to the remote table columns and
 Sys Id
    for (var i = 0; i < accounts.length; i++) {
      v_table.addRow({
        "u_sf_account_id": accounts[i].name,
        "u_sf_account_name": accounts[i].label,
        // assign remote table Sys Id to the primary key of the
 third-party
        // record
        "sys_id": accounts[i].name,
      });
    }

  // process errors
  } catch (error) {
     gs.addErrorMessage("Error trying to retrieve  Salesforce
 Accounts." +
                        "Please contact System Administrator.");
     gs.addErrorMessage("System Error: " + error.message);
  }

})(v_table, v_query);
```

Note: Not all IntegrationHub actions can be invoked from the remote table scripts. Specifically, Data Stream Actions cannot be called from the scripts. If the action you would like to use is a Data Stream Action, you might need to create your own action based on the REST step. An easy way to create an action is to copy an existing action and then modify it to accomplish your goal. You can find an example of custom spoke actions in this topic: Create Salesforce spoke actions to retrieve Opportunities for use in the remote table definition.

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Configure third-party data integration for CSM

Configure the required components to enable the third-party data integration feature for Agent Workspace for CSM.

Before you begin

Role required: admin

Procedure

1. Identify the third-party application.

   a. Verify that it has the corresponding IntegrationHub spoke and that it is activated on your instance.

   b. Follow the setup instructions specific to the spoke.
   For example, for the Salesforce spoke, follow the instructions in the Set up Salesforce spoke topic.

2. Identify the spoke action that retrieves the desired third-party data.
   You can find the list of available actions in the spoke documentation. If an action that performs the desired task does not exist, you can create your own action by copying an existing action and modifying it to suit your needs. You can find an example of the custom spoke actions in Create Salesforce spoke actions to retrieve Opportunities for use in the remote table definition.

   Note: Data Stream Actions cannot be used with the remote table.

3. Create the remote table on your ServiceNow instance to expose the data from the application through the GlideRecord interface.
4. Create the remote table script definition to map the data from the third-party table to the remote table.

   a. Configure error messages if the spoke action call results in an error.
   This error is picked up by the form, list, and field elements and is displayed for the end user when an error occurs. These error messages distinguish between cases where the response from the third-party application has no data and an error while fetching data from the third-party application.

   b. Configure ACLs on the remote table to provide users and roles with read access to the third-party data.

   c. Configure ACLs to revoke CREATE, WRITE, and DELETE access on the remote table for all users.

5. Configure the lists, forms, and fields that pull data from the remote table.
   Once the remote table is set up, you can access data using the GlideRecord interface.

   a. Use Agent Workspace components to embed third-party pages and reports in iframes as popups or related items.

   b. Configure UI actions on forms to create deep links to the records in the third-party application.

6. Perform some lightweight data synchronization prior to using the feature.
   For example, pull in account data from a third-party application using an import set. In the example provided, the Account (customer_account) table has an Account Id column, which

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is populated with the Id of the account in the third-party application instance. This column is used as the foreign key to pull opportunities for the corresponding account on the third-party application instance.

Reference Salesforce integration using remote tables

In this example, the Customer Account table is extended to include an associated Salesforce Account ID which, in turn, is used to retrieve Salesforce opportunities associated with this account. The remote table is used to hold the retrieved opportunity data.

Use the steps and the examples in the following topics to create a reference Salesforce integration using remote tables.

- Using the IntegrationHub Salesforce spoke.
- Using remote tables and the Salesforce spoke. Identify or create an IntegrationHub action that you can use to test the third-party data integration. Then use this action in the remote table definition.
- Using a related list to create the connection between the customer account and the Salesforce opportunities.

Using remote tables and the Salesforce spoke

Create Salesforce spoke actions that you can use to test the third-party data integration. Then use these actions in the remote table definition.

Using the IntegrationHub Salesforce spoke

Use the Salesforce spoke to integrate a Salesforce account with your ServiceNow instance.

Before you begin

Role required: admin

Procedure

To configure the Salesforce spoke, follow the instructions in Set up the Salesforce spoke.

Related topics

Using remote tables and the Salesforce spoke

Connect Customer Account and Salesforce Opportunities using a related list

Create Salesforce spoke actions to retrieve opportunities

The Salesforce spoke provides actions to retrieve metadata of the opportunity record and create a new opportunity.

Other than Data Stream Actions, there is no action to get a set of the opportunity records based on a given search criteria. You must create your own actions to accomplish the stated goal of the reference example. See Reference Salesforce integration using remote tables.

To create a new action, copy an existing action and modify it to suit your needs. For example, you can copy the **Get All Accounts** action and modify it to retrieve opportunity records.

For this example, you will create three new Salesforce spoke actions:

- Get All Opportunities
- Get Opportunities for Account Id
- Get Opportunity Details

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Each action includes three steps:

1. A pre-processing script step that creates a query.
2. A REST step that executes the query.
3. A post-processing script step that evaluates the response from the query.

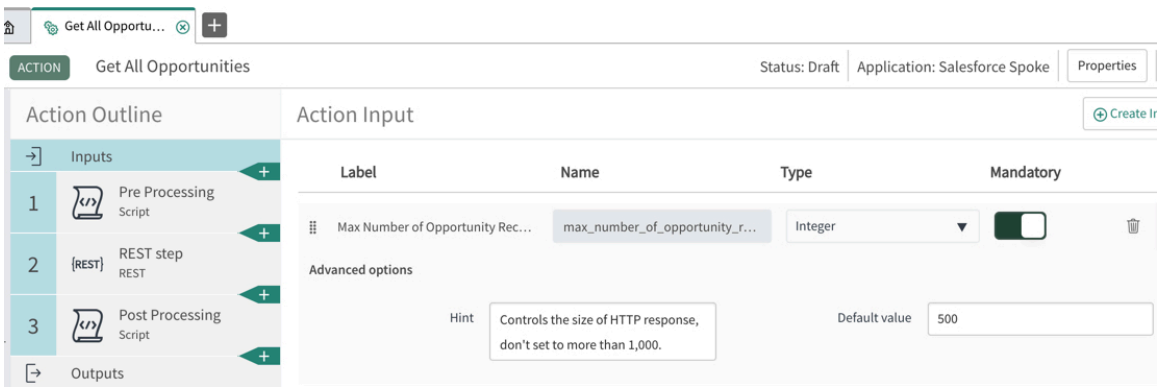
Note: You can test all actions from the Flow Designer before you attempt to connect them to the remote table.

Get All Opportunities custom action

The **Get All Opportunities** action retrieves opportunity records from the Salesforce application. This action is invoked when you view the remote Opportunity table.

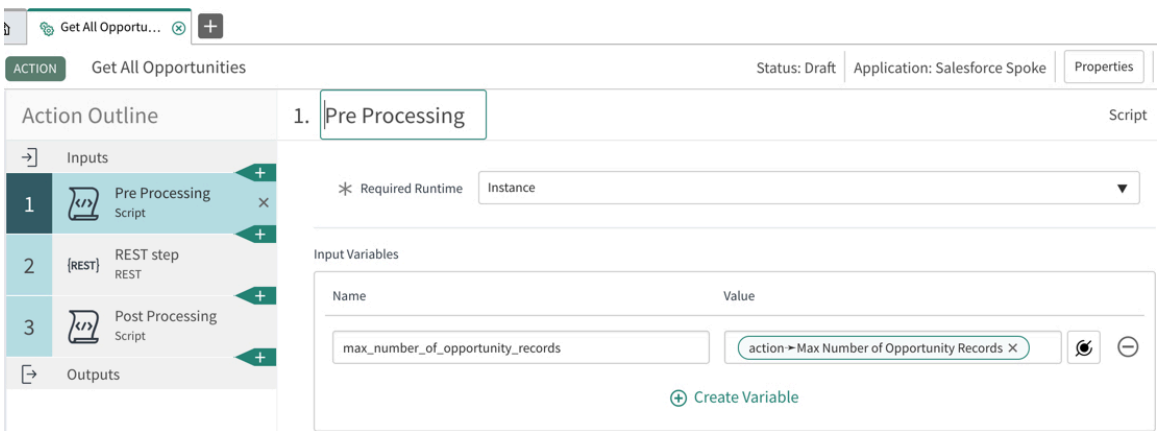
Action inputs

The **Get All Opportunities** action takes a single integer parameter that identifies the maximum number of records to be returned by the query. The REST-based actions can't accommodate pagination and, for this reason, it's important to limit the number of records returned from the third-party application. It isn't recommended to place more than 1,000 records in the remote table. The default number of records is 500.



Pre-processing step

The pre-processing script step takes the action input as its own.



The pre-processing script creates a SELECT query for all opportunities limited by the maximum number of records allowed. This query is based on the Salesforce Object Query Language (SOQL).

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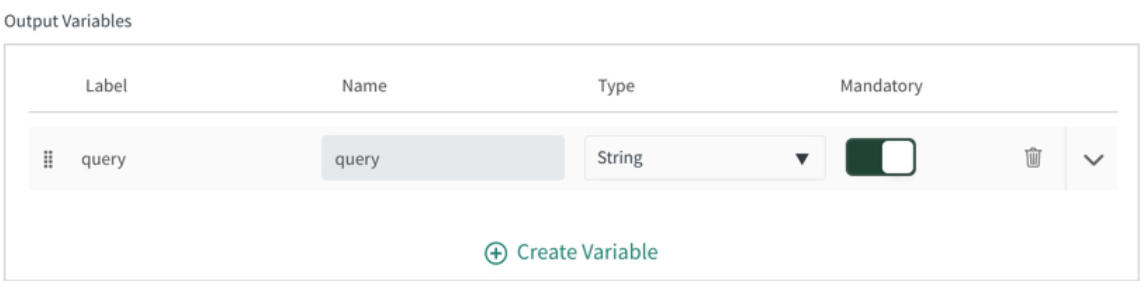
```
(function execute(inputs, outputs) {

  outputs.query =
 "query/?q=SELECT+Name,Id,AccountId,CloseDate,Amount,” +
                 “StageName,Probability,Type+FROM+Opportunity”;

  outputs.query = outputs.query +
                 “+LIMIT+” +
 inputs.max_number_of_opportunity_records;

})(inputs, outputs);
```

You must specify the fields from the opportunity records that you're interested in. This example uses the following fields: Name, Id, Account Id, Close Date, Amount, Stage Name, and Probability. To see the full list of available fields, use the **Get Opportunity Fields** action.

You can also control the ordering of the query search by adding the ORDERED BY keyword and value for ASC or DESC order direction. For example, you can add the following line to the script before the line specifying the LIMIT. It makes the query return the first 500 records with the most recent Close Date.

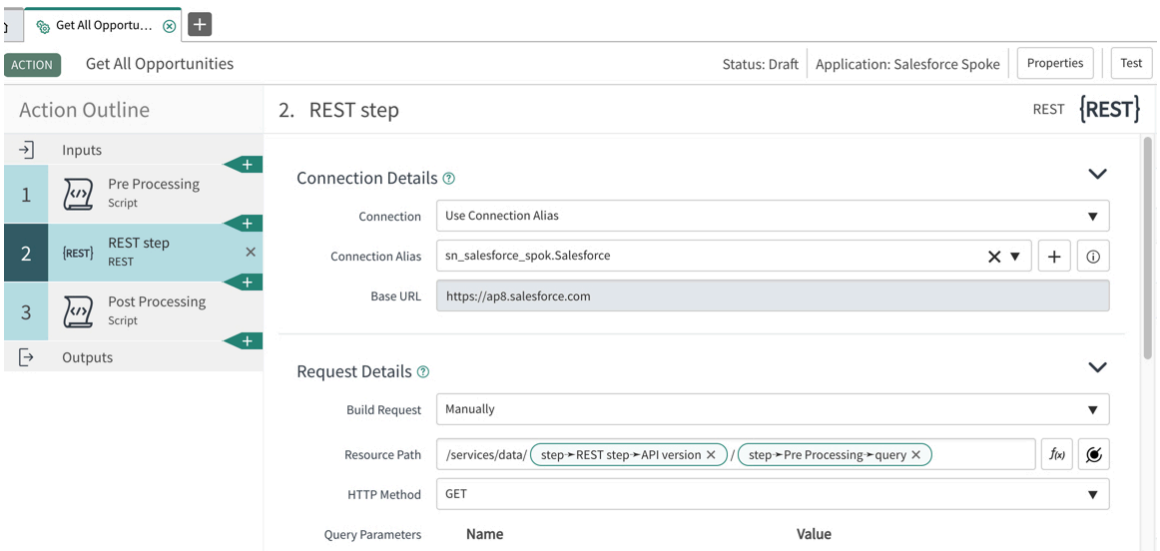
```
outputs.query = outputs.query + “+ORDERED+BY+CloseDate+DESC”;
```

The pre-processing output is a query.



REST step

The REST step is a standard REST step from the Salesforce spoke REST-based actions. You don't need to make any changes. Make sure that it points to the correct Connection Alias.



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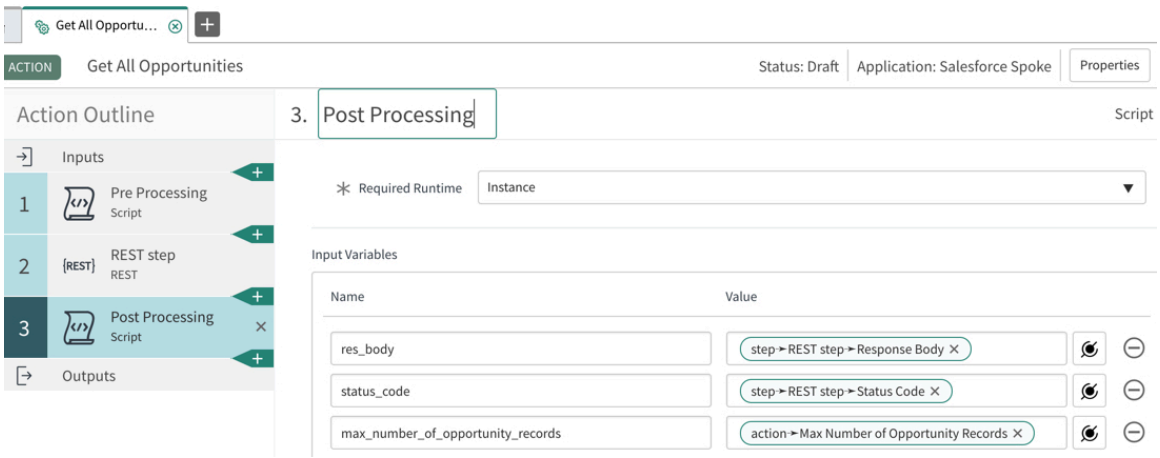
Post-processing step

The post-processing script step takes the action input and REST step output as its inputs.



The post-processing script checks the query response for errors, sets the error message if needed, extracts opportunity data from the response body, and creates an information message to indicate that not all data was retrieved from the Salesforce due to the number of records limitation.

```
(function execute(inputs, outputs) {

  try{
    var response = JSON.parse(inputs.res_body);
  } catch(e) {
    outputs = errorHandler(inputs, outputs);
  }


  function createOutputJson(inputs, outputs) {
    try{
      outputs.records = { data: response.records };
      outputs.status = "Success";

      if ( outputs.records.data.length ==
           inputs.max_number_of_opportunity_records ) {
        outputs.info_message = "Opportunity retrieve operation
was " +
                              "limited to" +

inputs.max_number_of_opportunity_records +
                              " records.";
      }
    } catch(e) {
      outputs = errorHandler(inputs, outputs);
    }
    return outputs;
  }


  function errorHandler(inputs, outputs) {
    outputs.status = "Error";
    outputs.error_message = "Unknown Error. " +
```

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```
                                “Please check error log for more
information";

    if(inputs.res_body.contains("message"))
      outputs.error_message = response[0].message;

    return outputs;
  }

  if(inputs.status_code == "200")
    outputs = createOutputJson(inputs, outputs);
  else
    outputs = errorHandler(inputs, outputs);

})(inputs, outputs);
```

The following are outputs of the post-processing step.

Output Variables

Label	Name	Type	Mandatory
records	records	JSON	✓
error_message	error_message	String	✓
info_message	info_message	String	✓
status	status	String	✓

Create Variable

Action outputs

Action outputs consist of the query status, error and information messages, and opportunity records. See the preceding screenshot for the action outputs.

Get Opportunities for Account Id custom action

The **Get Opportunities for Account Id** action retrieves opportunity records for the specific Salesforce account. This action is invoked when the agent views a Salesforce opportunity available for the customer account based on the Salesforce account associated with it.

This action is similar to the **Get All Opportunities** action.

Action inputs

In addition to the maximum number of records to be returned by the query, this action also takes a Salesforce Account Id as input to be used as a query parameter. The value of this parameter is provided by the relationship that links the customer account and the Salesforce opportunity through the associated Salesforce Account Id. For more information, see Create defined related lists.

The specific relationship needed for the reference example is also described in the Using a related list to create the connection between the Customer Account and Salesforce Opportunities topic.

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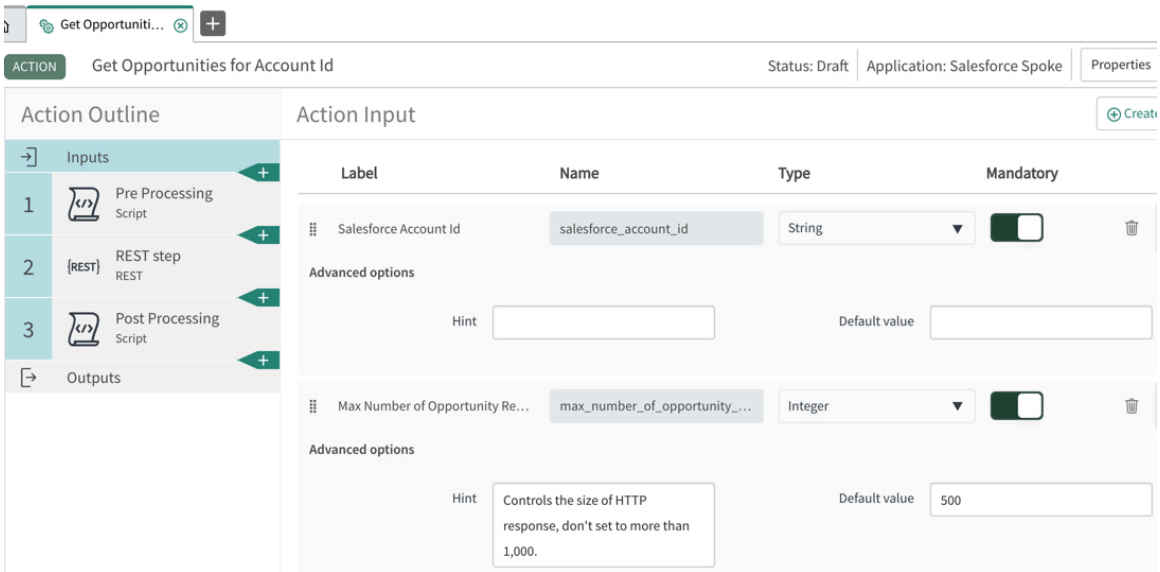
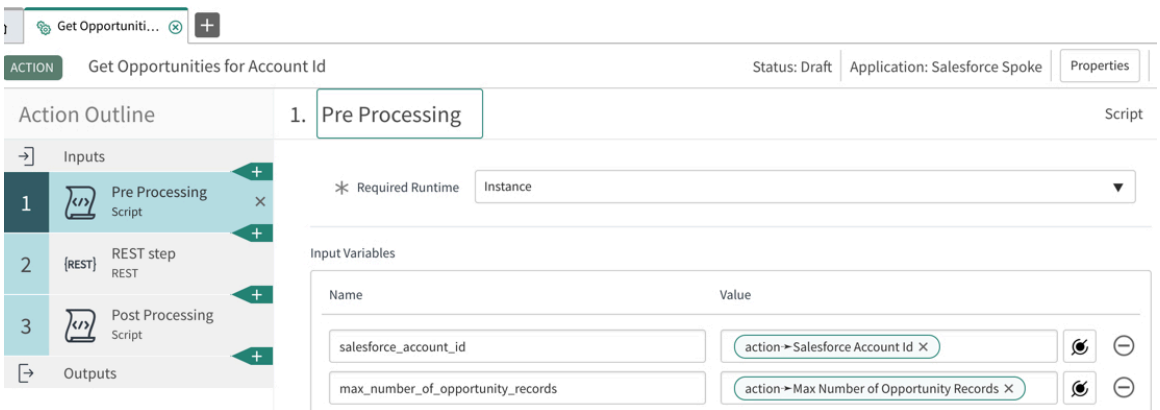
The Salesforce Account Id action input parameter has no default value.



Action Outline with Inputs: Pre Processing script, REST step, Post Processing script. Action Input showing Label, Name, Type, and a toggle for Mandatory.

Pre-processing step

The pre-processing script step takes the action input as its own.



The Pre-Processing step script creates a SELECT query similar to the one created for the **Get All Opportunities** action with the addition of the check against the Salesforce Account Id.

```
(function execute(inputs, outputs) {

  outputs.query =
 "query/?q=SELECT+Name,Id,AccountId,CloseDate,Amount,” +
                  “StageName,Probability,Type+FROM+Opportunity”
        +

                  "+WHERE+AccountId='" +
 inputs.salesforce_account_id + "

                  “+LIMIT+” +
 inputs.max_number_of_opportunity_records;

})(inputs, outputs);
```

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The pre-processing output is a query, similar to the **Get All Opportunities** action.

REST step, post-processing step, and action outputs

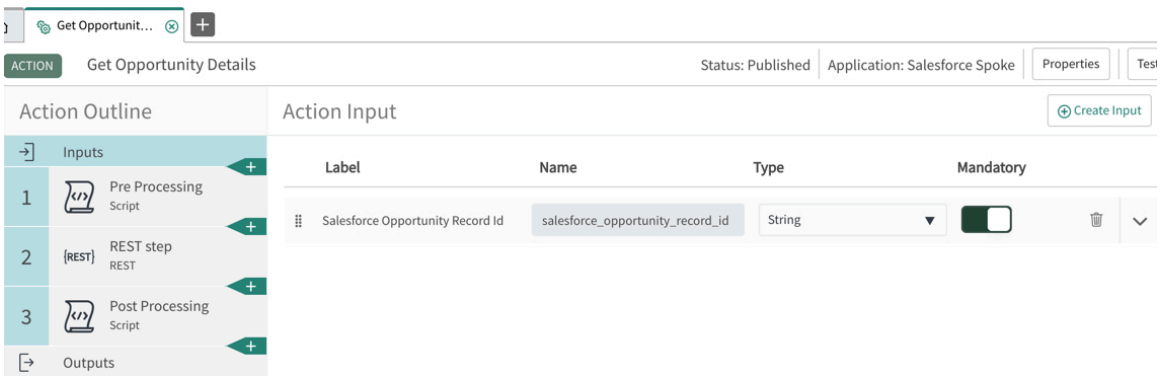
These steps and outputs are the same as for the **Get All Opportunities** action.

Get Opportunities Details custom action

The **Get Opportunities Details** action retrieves a single Opportunity record from the Salesforce application based on the record Id. This action is invoked when the user opens the form for the Opportunity record in the remote table.

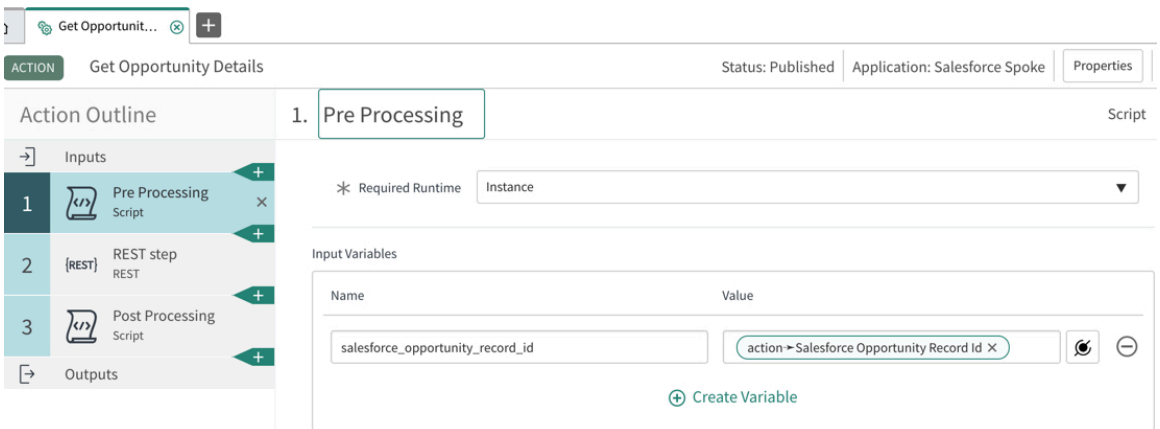
Action inputs

The **Get Opportunities Details** action takes a single integer parameter that identifies the Salesforce Account ID. This parameter is set by the form based on the sys_id that was provided to the remote table in the remote table script. For more information, see Example script that queries the Opportunity table.



Pre-processing step

The pre-processing script step takes the action inputs as its own.



As with other actions, the pre-processing step creates an opportunity query for the specific parameter. In this case, the match is done against the opportunity record Id. Do not worry about the LIMIT in this query because it returns at maximum a single record.

```
(function execute(inputs, outputs) {

  outputs.query =
 "query/?q=SELECT+Name,Id,AccountId,CloseDate,Amount," +
```

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```
                    “StageName,Probability,Type+FROM+Opportunity”
        +

                "+WHERE+Id='" +
 inputs.salesforce_opportunity_record_id + "'";

})(inputs, outputs);
```

The pre-processing output is a query similar to the other custom actions.

REST step, post-processing step, and action outputs

These steps and outputs are the same as for the other custom actions except there is no maximum number of records parameter and no information message.

Remote tables and definition

Once you have the spoke custom actions working, you need to create a remote table that describes the schema for the data to be retrieved from the Salesforce Opportunity table.

Create a remote table with the following information:

- Label: Salesforce Opportunity
- Name: u_st_salesforce_opportunity
- Application: Global
- Remote table: true

Create the script definition for the remote table (u_st_salesforce_opportunity), which does the following:

- Uses the spoke custom actions to pull data from the Opportunity table in the Salesforce instance.
- Maps the response from Salesforce into the remote table columns.

Example script that queries the Opportunity table

This example script queries the opportunity table using the **Get All Opportunities**, **Get Opportunities for Account Id**, and **Get Opportunity Details** custom actions.

The example script consists of three distinct parts:

1. The first part selects the correct custom action and prepares inputs for it.
2. The second part makes a call to the action.
3. The third part processes the outputs of the action.

Selecting a spoke action and preparing the inputs

In this section of the script, select one of the three custom actions that you are prepared to get opportunities from the Salesforce application:

- **Get All Opportunities**
- **Get Opportunities for Account Id**
- **Get Opportunity Details**

You can decide which action to call based on the parameters included in the `v_query` function argument.

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```
/****** Choose action and prepare action inputs *****/
var action = null;
var inputs = {};

// look up opportunity by salesforce record id
if (v_query.isGet()) {

  action = "get_opportunity_details";
  inputs.salesforce_opportunity_record_id = v_query.getSysId();


// look up opportunities by salesforce account id
} else if (v_query.getParameter("u_sf_account_id")) {

    if (v_query.getParameter("u_sf_account_id") == "undefined")
 {
      gs.addInfoMessage("Opportunities cannot be retrieved
 because " +
                        "this "Account does not have associated
 "    +
                        "Salesforce Account. Please contact
 System " +
                         "Administrator.");
      return;

    } else {
      action = "get_opportunities_for_account_id";
      inputs.salesforce_account_id =
 v_query.getParameter("u_sf_account_id");
    }

// look up all opportunities
} else {
  action = "get_all_opportunities";
}
```

Note that this script configures an information message if the Salesforce account is undefined when it's required by the action. The undefined value comes from the relationship that is described in Using a related list to create the connection between the Customer Account and the Salesforce Opportunities.

When the Salesforce account is undefined, there's nothing to query for in this case and the function returns without calling the spoke action.

Calling the spoke action

In this section of the script, call the action using the names of the Salesforce spoke and the selected action and store the outputs of the call.

```
/***** Call action *****/
var outputs =
        sn_fd.FlowAPI.executeAction("sn_salesforce_spok." +
 action, inputs);
```

Processing the action output

In this section of the script, process the outputs starting with the check for errors.

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```
/***** Process action outputs *****/
if (outputs.status != "Success") {
throw new Error(outputs.error_message);
}
```

If the query doesn't return any errors, the script must process the returned records and add them as rows into the remote table. Map the Salesforce Opportunity fields into the remote table columns.

```
var opportunities = outputs.opportunities.data;

 for (var i = 0; i < opportunities.length; i++) {
  var opportunity = opportunities[i];
  v_table.addRow({
    "u_sf_amount": opportunity.Amount,
    "u_sf_close_date": opportunity.CloseDate,
    "u_sf_name": opportunity.Name,
    "u_sf_probability": opportunity.Probability + "%",
    "u_sf_account_id": opportunity.AccountId,
    "u_sf_stage": opportunity.StageName,
    "u_sf_type": opportunity.Type,
    "sys_id": opportunity.Id,
  });
}
```

Note that the Salesforce opportunity record Id is assigned to the remote table sys_id. This verifies that lists and forms for the remote table function properly and that we are able to extract the record Id using `v_query.getSysId()` the next time that the remote table script is invoked.

Then display the information message if it was passed by the query.

```
if (outputs.info_message) {
  gs.addInfoMessage(outputs.info_message);
}
```

Putting the remote table script sections together

The three sections of the script are included in the try-catch block to provide for error handling.

```
(function executeQuery(v_table, v_query) {

  try {

    // place code here from: <Selecting a spoke action and
 preparing the inputs>

    // place code here from: <Calling the spoke action>

    // place code here from: <Processing the action output>

  } catch (error) {
    gs.addErrorMessage("Error retrieving  Salesforce
 Opportunities. " +
                        "Please contact System Administrator.");
    gs.addErrorMessage("System Error: " + error.message);
  }
```

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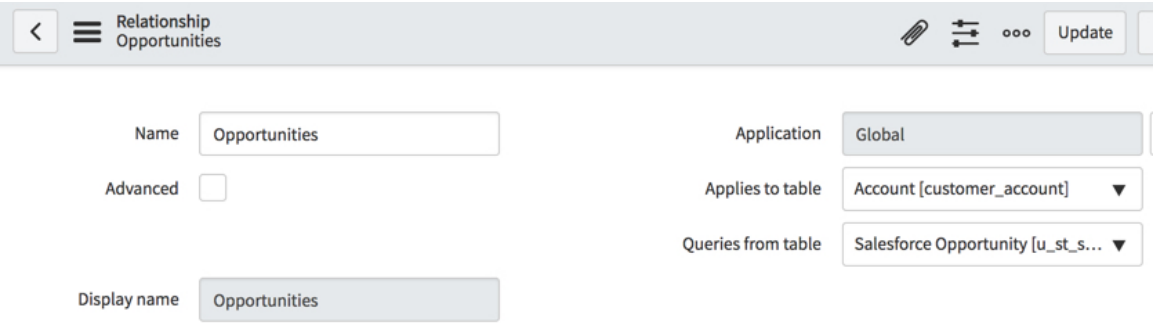
```
})(v_table, v_query);
```

Connect Customer Account and Salesforce Opportunities using a related list

Use a related list to link the Customer Account table with Salesforce Account Id, and the Salesforce Opportunity remote table with the same Account Id.

In this example, create a relationship called Opportunities. Choose the Account table in the **Applies to table** field and the remote opportunity table in the **Queries from table** field. For more information, see Create defined related lists.



Add the following code in the **Query with** field:

```
(function refineQuery(current, parent) {

  var sf_account_id = new
 String(parent.u_salesforce_account_id);

  if (sf_account_id.length == 0)
    sf_account_id = "undefined";

  current.addQuery("u_sf_account_id", sf_account_id);

})(current, parent);
```

This code checks for the presence of the Salesforce Account Id in the Account table and, if it's missing in the record, sets it to `undefined`. The code also includes a query for the Opportunity table column that holds the Salesforce Account Id for the value of this Id from the Account table. This query is invoked when the user opens the list of opportunities associated with the customer account. To see how it is used in the remote table script, see Selecting a spoke action and preparing the inputs.

CRM Workspace record pages and page templates

Use record pages to display information in CRM Workspace. Use page templates to create record pages.

Record pages

A record page provides the base structure for how a record is displayed in CRM Workspace. This includes records such as cases, incidents, and tasks.

Record pages include elements such as layouts, containers, and components to display record information. Some record pages leverage additional logic using presets, controllers, and extension points.

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Several record pages are included with CRM Workspace. You can use these record pages as is or you can customize them to suit your needs.

Record templates

A page template is a blueprint or a model of a record page that displays information in CRM Workspace. You can use page templates to create new pages or page variants in UI Builder.

Page templates can include components, data resources, extension points, and a layout. When you create a page or a page variant from a page template, you start from a base structure that you can customize to meet your needs.

The Customer Service application includes several page templates that you can use to create pages.

Workspace record page interoperability

Enable agents to use record pages between CRM Workspace and ITSM Service Operations Workspace (SOW). The following ITSM pages are interoperable across CSM:

- Incident page
- Change page

These ITSM pages are inactive by default. Users with the system administrator role can enable these pages as needed:

1. Navigate to the UX Cross-experience routes list (sys_ux_interoperable_route_list.do).
2. Select **SOW Incident and change Page use**.
3. Enable the page for editing and select the **Active** check box.
4. Select **Update** to save the changes.

Creating pages and page variants

You can create new pages or customize existing pages in UI Builder to display table and record information in CRM Workspace.

When you create a page in UI Builder, you have three options:

- Create a page from scratch
- Create a page from a template
- Duplicate and modify a page variant

UI Builder terminology

The following table describes the UI Builder terminology around workspace experiences, pages and page variants, and page templates. For more information about UI Builder terminology, see the UI Builder glossary.

UI Builder terminology

Term	Description
Workspace experience	A workspace experience in UI Builder is a collection of web pages. Users use these pages to interact with an application.

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UI Builder terminology (continued)

Term	Description
	A workspace experience includes experience settings, routes, page variants, and the audience and conditions required for each variant. A workspace experience resides at a specific URL. When an admin creates a workspace experience, they define the web address for the experience and the homepage that the experience uses.
Page collection	A page collection is a group of pages that can be used across multiple workspace experiences within tabs or modals.
Page	A page is a collection of layouts, columns, and components that display information in a workspace. • A page has a unique name. • A page has a unique URL. The page contains content that resides at this URL. • A page includes components that display data from tables and records.
Page variant	A page variant is a version of a page that has unique settings, including audience, conditions, and order. • Admins can create variants of pages to target experiences for different audiences at the same URL. • When a user opens a page URL, the variant that they see is based on these settings. You can create a page variant if you want to use the same page and make minor changes for a different audience. For example, you can create a landing page for customer service agents and a variant of that landing page for customer service managers.
Page template	A page template provides a base structure for a page that you can customize to meet your needs. Using a page template can help you create pages faster and keep pages consistent within an experience. Page templates can include components, data resources, and a layout.

Methods for creating pages and page variants

There are different ways to create pages and page variants in UI Builder.

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Methods for creating pages and page variants

Method	Description
Create a page from scratch	When you create a page from scratch, you start with a blank page and select layouts and components that guide a user through an experience. Components are like building blocks that you can add to the page and then customize to build the page functionality.
Create a page from a template	When you create a page from a template, you start with a base structure, including layouts and components. From this starting point, you can customize the page to meet your needs. When you create a page from a template: • The page is automatically active. • The page includes basic settings. • The first variant of the page is also created. You can add settings such as conditions and audience to the variant. For example, when you create a page from the Front-line case page template, the page includes only basic settings. It does not include the same settings as the Front-line case page variant that is provided out of box.
Create a page variant	When you create a page variant, you create a variation of a page that exists at the same path. When you create a page by duplicating a variant, the new page inherits the variant settings. By creating a page variant, you can target an experience for a specific audience and add conditions that determine when the variant is shown. • The audience determines who uses the page variant. For example, you can limit the audience to a specific user role. • The conditions determine when a page is shown. For example, you can add a condition for records from a specific table, such as the Case table.

For more information about customizing record pages, see Manage UI Builder pages and page variants.

Note: If a page is modified after page variants have been created, the changes to the page don't sync with the variants. These changes must be made manually.

Determining which record page is used

There are several settings that determine which record page the system uses to display information in CRM Workspace.

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- **Order value**: Each record page has an order value. The system uses this order value to determine which record page is used. The active page with the lowest order value is the default record page.
- **Conditions**: A record page can have one or more conditions that determine when it is used. For example, a record page can have a condition that specifies a table, such as the Interaction [interaction] table. This condition limits the use of the page to records from the Interaction table.
- **Audience**: A record page can have a defined audience or set of user roles such as the sn_customerservice_agent role. The audience determine the users that have access to the page. If a record page has no assigned user roles, then every role can access it.

The system chooses a record page by evaluating the settings on the available active pages:

- If there are no active pages with conditions or audience, the system chooses the page with the lowest order value.
- If there is an active page with one or more conditions and those conditions are met, the system chooses that page.
- If there are two active pages with the same conditions, the system chooses the page with the lowest order value.

For more information, see Set record page order.

Related topics

Create a Configurable Workspace experience

Create a Configurable Workspace page

CRM Workspace page templates

A page template is a blueprint of a record page that you can use to create a new page or page variant in UI Builder.

A page template can include components, data resources, extension points, and a layout. When you create a page or a page variant from a page template, you start from a base structure that you can customize to meet your needs.

You can select one of the CRM Workspace templates when creating a new page or a new page variant in UI Builder.

CRM Workspace record page templates

Template	Description
CSM default record	The CSM default record template includes CSM case management features and functionality and enables agents to create, monitor, and resolve cases. Use this template if you want to customize and extend CSM functionality around case management.
CSM Interaction record	The CSM Interaction record template includes the CSM interaction management features and functionality. This view enables agents to accept and respond to live chats, calls, and SMS messages. Use this template if you want to customize and extend CSM functionality around interaction management.
Front-line case page	The Front-line case page template gives front-line agents a dramatically simplified case view that uses less navigation and

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CRM Workspace record page templates (continued)

Template	Description
	is designed for speed. In one page view, they can look up and verify customers, scan a streamlined activity feed, and view related information. Faster context gathering can help them close cases that require simple solutions efficiently.
CSM voice interaction record	The CSM voice interaction record template enables customers to create voice interaction record page variants and customize them as needed. This template includes customizable views for different CCaaS providers as well as real-time updates and notifications. Record pages and page variants created with this template enable agents to manage phone calls with customers and external users. They also display information that helps agents to resolve issues. Use this template to customize and extend CSM functionality around phone interaction management. Additionally, you can configure a CCaaS provider to integrate features such as call transcript.
CSM centered chat interaction record page	The CSM centered chat interaction record template brings the chat component to the center of the workspace and give agents greater visibility and access to customer chat conversations. This page view enables agents to manage chats and displays information, such as customer history and interaction details, that help agents to resolve issues.

For more information, see Create a page from a template in the UI Builder documentation.

Record presence feature

Pages that you create from the CSM record page template and the CSM Interaction record page templates have the record presence feature available. This feature lets you see the users who are currently viewing a record. For more information, see User presence component.

CRM Workspace record pages

A record page provides the base structure for how a record is displayed in CRM Workspace. This includes records such as cases, tasks, and interactions.

Record page overview

Record pages include elements such as layouts, containers, and components to display record information. Some record pages leverage additional logic using presets, controllers, and extension points. Pages with preset and controller logic benefit from reusability because they automatically inherit styling, events, and data binding. This reusability makes simplifies configuration and makes the pages upgrade friendly.

Several record pages are included with CRM Workspace. You can use these record pages as is or you can customize them to suit your needs. For more information about customizing record pages, see Manage UI Builder pages and page variants.

Record pages available with CRM Workspace

Several record pages are included with CRM Workspace.

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CRM Workspace record pages

Page	Description
CSM default record page	This page provides the basic structure for case management, including record information, chat and phone features, and suggestions for resolving issues. **Note:** Use this page to display generative AI elements and functionality available with ServiceNow Otto for Customer Service Management (CSM).
Front-line case page	This page is designed for front-line agents. It provides a simplified case view that enables agents to quickly gather context, categorize cases, and provide prompt responses to customers.
CSM Interaction record page	This page includes CSM-specific features for interaction management, including interaction information and related search results, and enables agents to accept and respond to live chats, calls, email, and SMS messages. **Note:** Use this page to display generative AI elements and functionality available with ServiceNow Otto for Customer Service Management (CSM).
Email interaction record page	This page enables agents to manage email conversations with customers using interaction records.
CSM voice interaction record page	This page provides a component that customers can use for integration with Contact Center as a Service (CCaaS) providers. This component has an interface that agents can use to handle customer phone calls.
CSM centered chat interaction record page	This page provides a chat component in the center of the workspace that agents can use to handle customer chat conversations.
Record default	This page provides the basic structure for a record page, including record information, a communication interface, and suggestions for issue resolution. This page is also known as the standard record page. **Note:** The Record default page is no longer supported with patches and fixes.
Interaction record page	This page provides the basic structure for an interaction record, including interaction information and related search results.

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CRM Workspace record pages (continued)

Page	Description
	Note: The Interaction record page is no longer supported with patches and fixes.

Record page elements

Record pages are made up of different elements that determine how record information is displayed in CRM Workspace.

Record page elements

Element	Description
Layouts	The metadata that determines how components are positioned on a page and what CSS rules apply. Layouts enable you to create useful and visually appealing pages.
Containers	A container holds one or more components on a page. Think of a container as an area of the page where you add information, images, or functionality (your components).
Components	Components are the building blocks that you use to create pages. End users, such as agents, use components to view and interact with data. Commonly used components include Heading, Image, List, Form, and Button. For more information about components and component configuration, see the ServiceNow® Developer site.
Presets	A preset is a set of instructions that define configuration values for a specific component. A preset also specifies how a component connects to a controller. Using presets can simplify component configuration and enable you to avoid manual data binding.
Controllers	A controller combines the complex business logic, including data brokers, state parameters, scripting, and event management, into a single entity. Presets use the data in a controller to auto-configure a component.
Extension points	An extension point enables subpages, such as viewports and page collections, to inherit controllers from the parent page. Extension points also improve the ability to upgrade.

Determining which record page is used

Record pages include several settings that the system uses to determine which record page to use when displaying information in CRM Workspace.

- **Active**: A record page can be active or inactive. The system evaluates active pages when determining which page to use.
- **Order**: A record page has an order value. The system uses this order value when determining which page to use. The page with the lowest order value is the default record page.

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- **Conditions**: A record page can have one or more conditions that determine when it is used. For example, a record page can have a condition that specifies a table, such as the Interaction [interaction] table. This condition limits the use of the page to records from the Interaction table.
- **Audience**: A record page can have a specified audience. This audience determines who can see the page. If no audience is specified, all users can see the page.

The system chooses a record page by evaluating the conditions, order values, and audience on the available active pages.

- If there are no active pages with conditions or audience, the system chooses the page with the lowest order value.
- If there is an active page with one or more conditions and those conditions are met, the system chooses that page.
- If there are two active pages with the same conditions, the system chooses the page with the lowest order value.
- If an audience is specified, only those users can see the record page.

Default record pages

Each record page has an order value and the page with the lowest order number is the default record page.

New zBoot customers see the following pages by default:

- CSM default record page
- CSM Interaction record page

Upgrade customers retain their custom record pages. However, the following pages are no longer supported with patches and fixes:

- Record default
- Interaction record page

For more information about setting the default record pages, see Set record page order.

Note: Starting with the Australia release, the admin role includes all roles. With this change, the admin role can see the following pages:

- Front-line case page
- CSM centered chat interaction record page

Front-line case page

The Front-line case page provides a simplified case view that enables front-line agents to quickly gather context, categorize cases, and provide prompt responses to customers.

The Front-line case page focuses on the essential functionality that front-line or tier 1 agents need:

- Look up and verify customer information
- Scan the activity stream
- View related information
- Search for knowledge articles

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The Front-line case page is included with the CRM Workspace application.

Front-line case page variant

The Front-line case page variant is included with the CRM Workspace application. This variant includes the following settings.

Front-line case page variant settings

Setting	Description
Active	Enabling the **Active** check box makes the page variant available to the selected audience. The Front-line case page variant is active for new and upgrade customers. The active setting combined with the other page variant settings determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Front-line case page variant is 1000.
Conditions	Conditions determine when a page variant is displayed. The Front-line case page has the following condition: **table=sn_customerservice_case** This condition limits the use of the Front-line case page variant to records from the Case [sn_customerservice_case] table and tables that extend the Case table.
Audience	The audience determines who can see the page variant. The Front-line case page has the following audience: **CSM - Front-line Agent** This audience includes the sn_cwf_wrkspc.frontline_agent role. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. In the Record section of the Pages and variants list, select **Front-line case page**.
4. Select **Settings** at the top of the page.

Roles

The CRM Workspace application includes the following role: Front-line agent role (sn_cwf_wrkspc.frontline_agent). Agents with this role have access to the Front-line case page in CRM Workspace.

The Front-line case page variant includes the CSM - Front-line Agent audience, which includes the sn_cwf_wrkspc.frontline_agent role.

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Note: To make the Front-line case the default page, the system administrator can set the page to active and set it to the lowest page order.

Front-line case page components

The Front-line case page includes the following components.

Component	Description
Form header	The form header displays the case short description. Agents can quickly glance at the form header to see what the case is about. Agents can edit the short description of a record directly from the record header field. For more information, see Editable record headers.
Record tags	Tags enable agents to assign categories to records. Agents can create multiple tags for a record and then use the tags to group and organize records.
Action bar	The action bar contains the actions available to agents while working on case records. This includes buttons and items in the More Actions menu. The specific actions are determined by factors such as the user role, case state, and other attributes.
Contact lookup	The contact lookup component enables agents to search for contacts and link them to the case record. Agents can use the contact lookup component to do the following: • Search for a contact. • Link or unlink a contact. • Edit and save a linked contact record. • Select a reference field on a lookup card, such as a contact name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. The contact lookup component displays information in record cards. These cards display contact information and provide quick access to details such name, email, and phone. For more information, see the Contact and consumer lookup components section below.
Consumer lookup	Agents can use the consumer lookup component to do the following: • Search for a consumer. • Link or unlink a consumer.

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Component	Description
	• Edit and save a linked consumer record. • Select a reference field on a lookup card, such as a consumer name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. The consumer lookup component displays information in record cards. These cards display consumer information and provide quick access to details such name, email, and phone. For more information, see the Contact and consumer lookup components section below.
Case details	The case details component includes collapsible sections for: • Case • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL.
Case summarization	The case summarization component appears above the activity stream. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the ServiceNow Otto for Customer Service Management (CSM) application to be activated and configured. For more information, see the Case summarization component section below.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, see the Activity stream component section below. **Note:** The Front-line case page uses modeless dialogs for composing comments, work notes, and emails.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues.

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Component	Description
	The contextual side panel in the Front-line case page includes the following tabs. • Record information, including SLA details • Recommended Actions search • Attachments • Form Templates • Response Templates • Email Templates • Related Lists • Collaborate For more information, see the following sections: • Contextual side panel component • Related lists component

Action bar component

The Front-line case page supports actions from the following Customer Service Management and CRM Workspace plugins:

- Case Management Core (com.sn_customerservice)
- CRM Workspace Core (com.snc.agent_workspace.csm)
- CRM Workspace (com.snc.uib.csm_agent_workspace)
- CRM Workspace Foundation (com.snc.uib.cwf_workspace)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management plugin (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, you must add the actions from those plugins to the Front-line case page action bar. For more information, see Configure the Front-line case page action bar.

The **Create** action on the Front-line case page displays a list of available actions. Selecting an action from this list opens the record either in a sub-tab or in a modeless dialog. For more information, see Create action layout group.

The Front-line case page action bar includes the **Follow** action in the More Actions menu. Selecting this action enables you to receive notifications when comments or work notes are added to the record.

You receive notifications in the Notifications menu at the top of the page according to your notification preferences. You can select the notification to open the record that was updated. For more information, see the following topics:

- Configure Next Experience notification preferences
- Follow records in Next Experience

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When the **Follow** action is selected, the button toggles to **Unfollow**. To stop receiving notifications, select **Unfollow**.

Contact and consumer lookup components

The contact and consumer lookup components enable users to do the following:

- Look up a contact or consumer by name, phone number, or email address. As you type characters in the search box, matching information appears in record cards below the search box.
- Select a contact or consumer after searching by selecting the desired record card. The selected record card replaces the lookup component.

User roles determine which lookup component appears on the Front-line case page.

- Front-line case agents can see the Contact lookup component.
- Consumer agents with the Front-line case agent role can see the Consumer lookup component.
- Some users, such as managers, can have both B2B (account and contact) and B2C (consumer) roles. When a user has both roles, they can see both the Contact and Consumer lookup components.

When using the Contact lookup component to look up and select a contact, the system hides the Consumer lookup component. When using the Consumer lookup component to look up and select a consumer, the system hides the Contact lookup component.

When using the Contact component, the system displays the contacts for the selected account. If the agent selects a different contact, the system updates the account.

After selecting a contact or consumer, users can perform the following actions from the contact or consumer record card:

- Remove a linked contact or consumer from a case record by selecting the more actions icon and then selecting **Unlink**.
- Edit and save a linked contact or consumer record by selecting the pencil icon, editing the information for the contact, and selecting **Save**.
- Select a reference field on a lookup card to open the referenced record in a subtab.
- Select an email address on a lookup card to open to open the email composer in a subtab.
- Select a phone number on a lookup card to make a phone call.
- Collapse the card to display more record content. When collapsed, users can see a link to the contact or consumer name.

The Contact and Consumer lookup components include advanced search capabilities that enable agents to perform a type-ahead search across multiple tables and fields. This includes the following types of matching:

- Exact match: phone number and record number
- Starts with match: name and email address

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Case summarization component

The case summarization component provides agents with a summary of a customer service case, including the issue and the actions taken. Agents can generate summaries to understand case context and post summaries to the case work notes.

The case summarization component appears above the activity stream on the Front-line case page variant. Upon first opening a case, the component is collapsed and in the default state.

Using this component, agents can:

- Select **Summarize** to create a summary of the case details.
- Select **Share to work notes** to copy the summary text to the activity stream.
  - Review the summary text in the Share to work notes pop-up window and modify the text as needed.
  - Select **Save to work notes** on the pop-up window to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

Note: If the case does not contain enough text to summarize, the system displays the following message: "This case doesn't have the minimum number of words required for summarization yet."

To use the case summarization component with the Front-line case page, activate the ServiceNow Otto for Customer Service Management (CSM) application and configure the case summarization skill in the AI Admin Hub. For more information, see:

- Supporting information for ServiceNow Otto for Customer Service Management (CSM)
- Configuring ServiceNow Otto for Customer Service Management (CSM)

Activity stream component

The activity stream component displays a list of the activities occurring on a case record. The activities in the list can be collapsed or expanded. When collapsed, the agent can quickly scan the list to get an overview of case activities. When expanded, the agent can see detailed information on individual activities.

The activities in the activity stream are represented by tiles that use icons and colors to indicate the activity type.

- Comment
- Work note
- Attachment
- Field change
- Email sent or email received
- Chat discussion
- Custom icon

When collapsed, each activity in the list includes:

- A tile that represents the activity type.
- The name of the user responsible for the activity.
- A brief one-line summary of the activity.
- A badge that indicates if an activity is internal or external.

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- A relative timestamp.
- An expand button that the agent can use to see a detailed summary of the activity.

When expanded, each activity also includes:

- A full date and time stamp.
- An action label that describes the type of activity.
- For comments and work notes, the full text of the comment or work note.
- For field updates, the field name and the updated field value.
- For emails, detailed message information.
- For attachments, a small preview of the attached file.
- For chats, a sidebar chat card.

The activity stream uses Modeless dialogs for composing comments, work notes, and emails.

Contextual side panel component

The Front-line case page includes the contextual side panel component, which provides agents with the following functionality.

Front-line case page tabs in the contextual side panel

Tab	Description

Recommended Actions	The Recommended Actions tab is now available as the first tab in the contextual side panel and is enabled for Pro customers. It includes a set of base system recommendations, such as similar incidents and similar open incidents.
	The Recommended Actions tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues.
	The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search.
	From the list of search results, agents can do the following:
	• Select a source to see search results of that type.
	• Filter the list of search results.
	• Sort the list of search results.
	• Open the search results in full view in a record sub-tab.
	• Take the following actions:
	  ○ Attach and share article
	  ○ Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful.
	• View successful actions by selecting the Actions history icon.

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Front-line case page tabs in the contextual side panel (continued)

Tab	Description
	Suggested Actions tab: This tab displays relevant actions to agents based on the context of a record or recommends a value for a field. For more information on how to configure contexts to display relevant actions for the agent, see Recommended Actions. The Suggested Actions tab is available in the base system for Pro customers and doesn't require additional configuration. It becomes visible when the Task Intelligence plugin is installed. Non-Pro customers can enable the tab manually. • Without the plugin, only the Search tab is visible on the Front-line case page. • With the plugin installed, both Search and Suggested Actions tabs appear, and recommendations are shown under Suggested Actions. • If the plugin is uninstalled, the Suggested Actions tab is no longer available. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.
Record Information	The Record Information tab includes the following information: record overview and SLAs. • The **Overview** card displays relevant information about the record including account and contact, case priority, and state. • The Task SLA cards component displays cards with the record SLA information, including time remaining, the SLA state, and any breaches. For more information, see Task SLA cards component. **Note:** The cards that appear in the Record Information tab can be configured in the **Front-line Case Page Ribbon Config** ribbon configuration. For more information, see Set up a ribbon configuration in CRM Workspace.
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new

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Front-line case page tabs in the contextual side panel (continued)

Tab	Description
	records. Agents can manually apply a template when creating a new record such as an incident or change.
Response Templates	The Response Templates tab provides access to available response templates. These templates contain reusable messages that agents can copy to provide quick and consistent messages to customers.
Email Templates	The Email Templates tab provides access to available email templates. These templates contain default values for fields that agents can add to email messages. These default values can include: • The recipients (email addresses in the To, Cc, and Bcc fields) • The sender • The subject of the email • Text to include in the message body
Related Lists	The Related Lists tab provides access the case-related lists. The Front-line case 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. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. For more information, see the Related lists component section below.
Collaborate	The Collaborate component enables agents to communicate with stakeholders and other users and gather information for case resolution. For more information, see Collaborate component.

Related lists component

The related lists component provides access to the case related lists. This component uses an expandable accordion format. Agents can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

Related lists include the following actions:

- **Create**: Opens a blank record in a sub tab that the agent can use to create a new item.
- **View all**: Opens a list of records in a sub tab.
- **Show more**: is displayed for lists that have more than five items.

The items in an expanded list are displayed as cards. An expanded list shows one card for each item in the list.

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- Agents can open an item in a sub-tab.
- If a list has more than five items, it includes a **Show more** option.

Customer History component

The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component displays the information previously displayed in the Customer Activity tab. For more information, see Customer History component in the Customer Central documentation.

Record presence feature

The Front-line case page includes the record presence feature. This feature allows agents to see other users who are viewing the same record and enables easy collaboration.

The user presence component displays an icon in the form header that shows the user who is currently viewing the record. For three or more users, the component displays two icons plus a number that represents additional users.

- Hover over an icon to see more information about a user.
- Select the number icon to see more information about the additional users.

For more information about this feature, see User presence.

Requesting information from customers

The Front-line case page includes a **Request Info** UI action that agents can use to request information from customers. This action provides agents with the option to send a comment to the customer when requesting information.

Note: The **Request Info** UI action is available to users with the sn_cwf_wrkspc.frontline_agent role and for cases in the Open state.

The **Request Info** UI action on the Front-line case page behaves differently than the same action on the CSM default record page. On the Front-line case page, this action moves a case to the Awaiting Info state but does not require the agent to add a comment.

To request information:

1. Select **Manage Case** in the action bar.
2. Select **Request Info**.

The system sets the case **State** field to Awaiting Info and displays the following message to the agent: *`Send a comment to request info if you haven't already. The case is awaiting info.`*

- If the agent has not sent a comment, they can compose and post a comment in the activity stream.
- If the agent has already composed a comment and then selects **Request Info**, the system saves the record and automatically posts the comment to the activity stream.

Attaching and sharing knowledge articles

Agents can share articles with customers by using the **Attach and share article** knowledge guidance. This guidance recommends relevant knowledge articles to customer service agents

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and enables them to share the selected articles with customers in comments, work notes, or emails.

From the Recommendations tab in the contextual side panel, agents can use modeless dialogs to do the following:

- Attach and add a link to a comment.
- Attach and add a link to an email.
- Add a link to a work note.

Selecting these actions displays the comment, work note, or email modeless dialog. Once the guidance is executed, it is marked as Complete. After an action is completed, an entry is posted in the case record activity stream.

To display the knowledge article links that are added to the modeless dialogs with the **Attach and share article** guidance, the system administrator needs to manually enable the rich text editor:

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search for the *glide.ui.journal.use_html* system property.
3. Set the **Value** to true.

When the *glide.ui.journal.use_html* is set to true, the Rich Text Editor is enabled by default for comments and work notes in the Activity Stream. A **Rich Text Editor** toggle appears in the upper-right corner of the message box, allowing users to switch between rich text and plain text as needed.

The editor provides options such as bold, italics, lists, hyperlinks, and text alignment to help create structured, readable content. This setting does not affect email composition, which is managed
separately via *sys_email_client_confguration*. The rich text editor and formatting options are available by default in email messages, but the toggle does not appear.

For more information about the knowledge guidance, see Attach and share article guidance.

Create action layout group

The **Create** action on the Front-line case page displays a list of available actions that agents can select.

Actions and action groups

Configurable workspace record pages include individual actions that users can take when working with forms, such as **Save** or **Discuss**. Action groups combine multiple actions in the same button, such as **Create**, which displays a drop-down list with the available actions.

Customers can configure these action groups and arrange the order of the actions in the list using customizable form action layout groups.

Action groups are stored in the UX Form Actions Layout Group table [sys_ux_form_action_layout_group]. The actions included in a group are displayed in the **Form actions in group** related list on the UX Form Actions Layout Group form. They are stored in the Sys Ux M2m Action Layout Group Actions table [sys_ux_m2m_action_layout_group_action].

For more information about form action layout groups, see Declarative actions in the Configurable Workspace UI documentation.

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Create action layout group

The Front-line case page includes the **Create** action in the workspace action bar. Selecting **Create** displays a drop-down list with the available actions. These actions can include:

- Create Escalation
- Create Knowledge Gap
- Create Problem
- Create Incident
- Create Normal Change
- Create Work Order
- Create Request
- Create Standard Change

Note: Some actions that are available in the **Create** action group have been moved from the More actions menu. If you have customized the Create action for the Front-line case page, you need to manually upgrade to use the actions in the Create action layout group.

Selecting an action

Depending on the action that an agent selects from the **Create** drop-down list, the system either opens a record in a sub-tab or in a modeless dialog. The following actions open a record in a modeless dialog:

- Create Escalation
- Create Knowledge Gap
- Create Problem
- Create Incident
- Create Normal Change
- Create Work Order

From the modeless dialog, users can perform the following actions:

- Minimize the record to the workspace dock.
- Open the record in a sub tab.
- Save and stay.
- Close the dialog.

Front-line case page keyboard shortcuts

Use keyboard shortcuts to create comments, work notes, and emails quickly, when using the Front-line case page in CRM Workspace.

When composing an email, using the shortcut key enables you to compose an email in a subtab.

When composing a comment or work note:

- If you have a work note in progress, using the keyboard shortcut displays the existing work note.
- If you have a comment in progress, using the keyboard shortcut displays the existing comment.

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Keyboard shortcuts

Action	Windows keyboard shortcut	Mac keyboard shortcut
Compose an email	Control+Alt+e	Command+Option+e
Compose a comment	Shift+Alt+c	Shift+Option+c
Compose a work note	Shift+Alt+w	Shift+Option+w

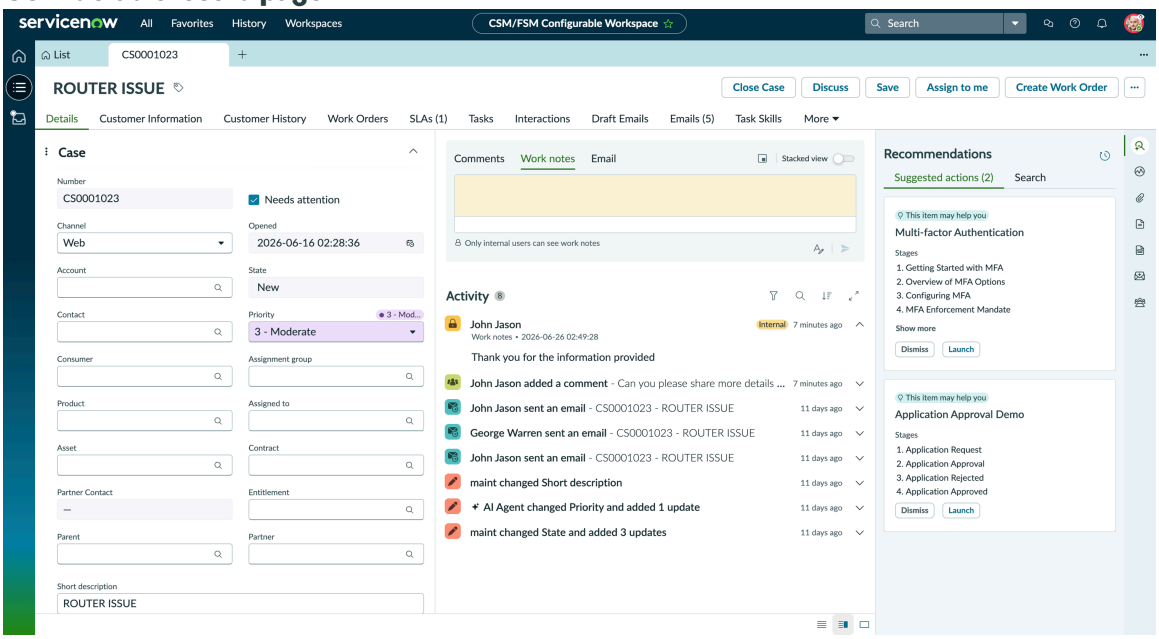
For more information, see Next Experience keyboard shortcuts.

CSM default record page

The CSM default record page provides case management features and functionality and enables agents to create, monitor, and resolve cases.

The CSM default record page includes the basic structure for a record page, including record information, a communication interface, and suggestions for issue resolution. This page is also known as the standard record page.

CSM default record page



The CSM default record page is included with the CRM Workspace experience.

Activity stream component

The activity stream component on the CSM default record page displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information about this component, see Activity stream component.

Action bar component

The action bar contains the actions available to users while working on case records. The specific actions are determined by factors such as the user role, case state, and other attributes.

- **Create**: Create records such as work orders, incidents, and requests.
- **Manage case**: Perform case management actions such as accepting a case or requesting information.

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- **Save**: Save changes to the case record.
- **Follow**: Receive notifications when comments or work notes are added to the record.
- **More Actions**: Perform additional actions such as following a case, proposing a major case, or reporting a knowledge gap.

The CSM default record page action bar includes the **Follow** action in the More Actions menu. Selecting this action enables you to receive notifications when comments or work notes are added to the record.

You receive notifications in the Notifications menu at the top of the page according to your notification preferences. You can select the notification to open the record that was updated. For more information, see the following topics:

- Configure Next Experience notification preferences
- Follow records in Next Experience

When the **Follow** action is selected, the button toggles to **Unfollow**. To stop receiving notifications, select **Unfollow**.

Thin compose modeless dialogs

The CSM default record page uses the thin compose modeless dialog feature, which incorporates modeless dialogs into the activity stream. This feature enables agents to initiate a comment, work note, or email in the activity stream and then open the text in a modeless dialog. For more information, see Thin compose modeless dialogs.

Record presence feature

The CSM default record page and the CSM Interaction record page include the record presence feature. This feature allows agents to see other users who are viewing the same record and enables easy collaboration.

The user presence component displays an icon in the form header that shows the user who is currently viewing the record. For three or more users, the component displays two icons plus a number that represents additional users.

- Hover over an icon to see more information about a user.
- Click the number icon to see more information about the additional users.

For more information about this feature, see User presence.

Email templates feature

The CSM default record page includes the Email Templates feature. CRM Workspace pages that use the CSM default record page include the Email Templates tab in the contextual side panel.

These templates contain default values for fields that agents can easily add to email messages in the Compose panel on case records. These default values can include:

- The recipients (email addresses in the To, Cc, and Bcc fields)
- The sender
- The subject of the email
- Text to include in the message body

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Users with the system administrator role can configure email templates by navigating to **All** > **Email Client** > **Email Client Templates** and selecting **New**. For more information, see Create an email client template.

Agents can use this feature to do the following:

- View available email templates.
- Select an email template to display the template details.
- Apply the selected template to an email in the Compose panel.

For more information, see Compose an email from an email template.

Creating emails and applying email templates

Customer service agents can create emails from case records in the following ways:

- By selecting **Email** at the top of the activity stream to open the Compose Email component.
- By selecting the More actions (···) menu in the case activity bar and then selecting **Compose email** to open a draft email in a new tab.

When creating emails, agents can apply templates to add content to the draft emails, such as the subject line and message body. To apply a template:

1. Select the Apply email templates icon ( ) in the Compose email footer.

   The system displays a list of available templates. It does not display quick messages or response templates.

2. Select a template from the list. You can also search for a specific template.

   The system adds the contents of the template to the body of the email.

Note: If no templates are available, the icon does not appear in the footer.

Recommended Actions feature

The Recommended Actions tab is now available as the first tab in the contextual side panel and is enabled for Pro customers. By default, the Recommended Actions tab on the CSM default record page is designed to show on the base system Case table (`sn_customerservice_case`). It includes a set of base system recommendations, such as similar incidents and similar open incidents.

Note: The Hide tab condition on the Recommended Actions tab in the Tab sidebar component matches the base system Case table name exactly. As a result, the tab doesn't appear for records from tables that extend the Case table. For more information, see Recommended Actions tab not appearing on the CSM default record page.

The Recommended Actions tab includes AI search functionality and Suggested Actions.

- AI search tab: Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type.

  The following table shows the actions that an agent can perform on search results:

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Source type and guidance actions on the CSM default record page

Source type	Guidance actions
Knowledge base articles	○ Attach and add a link in email. ○ Attach and add a link in comment. ○ Add a link in work note. ○ Copy a link. ○ Read an article. ○ Mark an article as helpful.
Cases	○ Show or copy a resolution for resolved cases. ○ Link or open a case.
Incidents	○ Link an incident. ○ Open an incident.
Problems	○ Link a problem. ○ Open a problem.
Requests	○ Link a change request. ○ Open a change request.

For all the other source types, default guidance is supported. The Default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances. For more information on default guidance, see Default guidance for search results.

For more information on how to avail the AI search feature in Recommended Actions, see Enable AI search in Recommended Actions.

For more information, see Use AI search in Recommended Actions to resolve cases.

Note: Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.

- Suggested Actions tab: This tab displays relevant actions to agents based on a context of a record or recommend a value for a field. For more information on how to configure contexts to display relevant actions for the agent, see Recommended Actions.

  The Suggested Actions tab is available in the base system for Pro customers and doesn't require additional configuration. It becomes visible when the Task Intelligence plugin is installed. Non-Pro customers can enable the tab manually.

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- Without the plugin, only the Search tab is visible on the Front-line case page.
- With the plugin installed, both Search and Suggested Actions tabs appear, and recommendations are shown under Suggested Actions.
- If the plugin is uninstalled, the Suggested Actions tab is no longer available.

Editable record header field

Agents can edit the short description of a record directly from the record header field. For more information, see Editable record headers.

Collaborate component

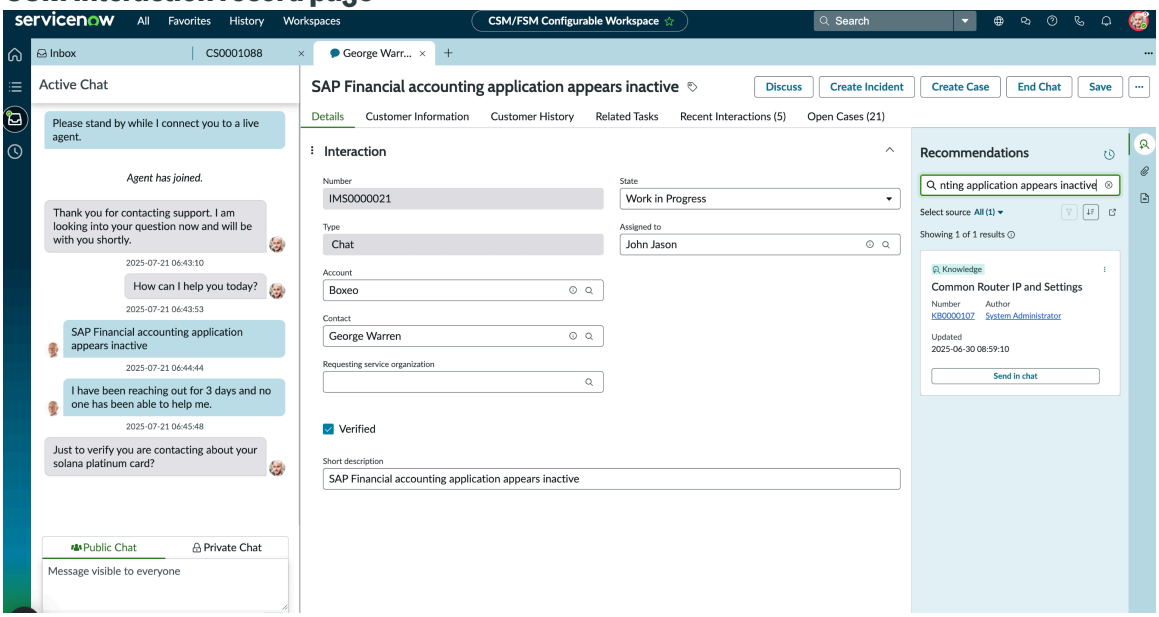
The Collaborate component enables agents to communicate with stakeholders and other users and gather information for case resolution. This component is available on the CSM default record page n the contextual side panel. For more information, see Collaborate component.

CSM Interaction record page

The CSM Interaction record page provides CSM interaction management features and functionality and enables agents to accept and respond to live chats, calls, email and SMS messages.

The CSM Interaction record page provides the basic structure for an interaction record, including interaction information and related search results.

CSM Interaction record page



The CSM Interaction record page is included with the CRM Workspace experience.

Record presence feature

The CSM default record page and the CSM Interaction record page include the record presence feature. This feature allows agents to see other users who are viewing the same record and enables easy collaboration.

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The user presence component displays an icon in the form header that shows the user who is currently viewing the record. For three or more users, the component displays two icons plus a number that represents additional users.

- Hover over an icon to see more information about a user.
- Click the number icon to see more information about the additional users.

For more information about this feature, see User presence.

Thin compose modeless dialogs

Thin compose modeless dialogs enable agents to initiate a work note or email from the activity stream in a modeless dialog.

Note: For the CSM Interaction record page, the thin compose modeless dialogs feature is hidden by default and can be enabled by the admin.

Recommended Actions feature

The Recommended Actions tab is now available as the first tab in the contextual side panel and is enabled for Pro customers. It includes a set of base system recommendations, such as similar incidents and similar open incidents.

The Recommended Actions tab includes AI search functionality and Suggested Actions for the chat, video, email, and walk-up channels on the CSM Interaction record page.

- AI search tab: Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the interaction short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type.

  For the Knowledge source type, agents can do the following:

  - Share an article link in chat and email.
  - Copy a link to an article.
  - Read an article.
  - Flag an article.
  - Mark an article as helpful.

  For all the other source types, default guidance is supported. The default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances. For more information on default guidance, see Default guidance for search results.

  For more information on how to avail the AI search feature in Recommended Actions, see Enable AI search in Recommended Actions.

  For more information, see Use AI search in Recommended Actions to resolve cases.

  Note: Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.

- Suggested Actions tab: This tab displays relevant actions to agents based on a context of a record or recommend a value for a field. For more information on how to configure contexts so that relevant actions are displayed for the agents, see Recommended Actions.

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Editable record header field

Agents can edit the short description of a record directly from the record header field. For more information, see Editable record headers.

Collaborate component

The Collaborate component enables agents to communicate with stakeholders and other users and gather information for case resolution. This component is available on the CSM default record page n the contextual side panel. For more information, see Collaborate component.

Related topics

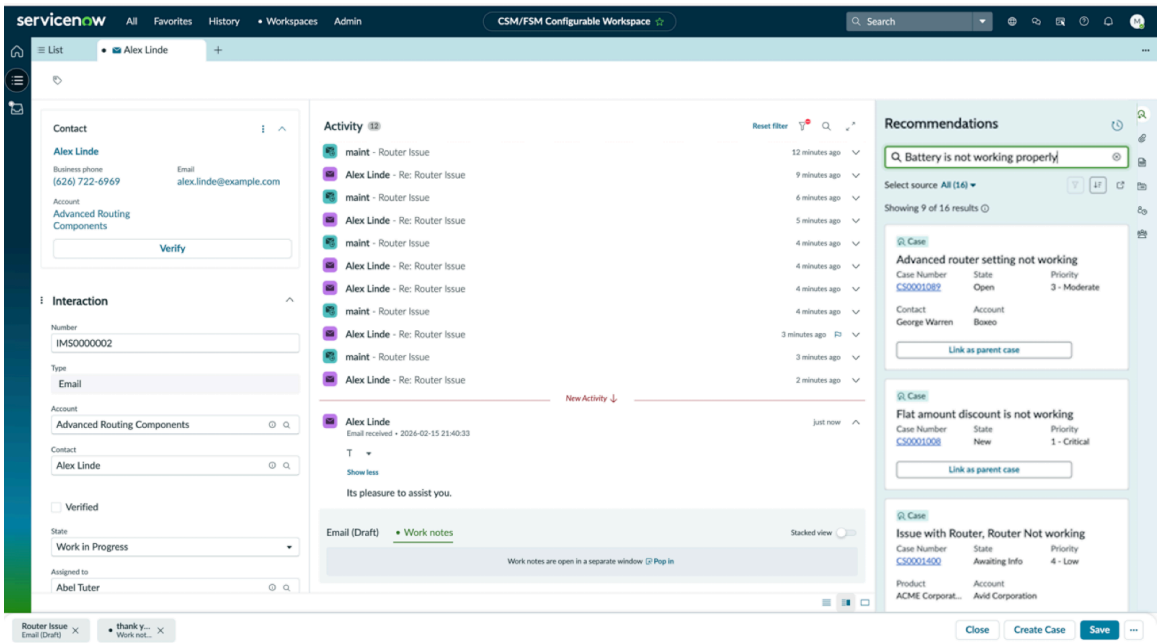
CSM voice interaction record page

Email Interaction record page

The Email interaction record page enables agents to manage email conversations with customers using interaction records.

Email interaction record page variant

The Email interaction record page variant is included with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace). This page variant includes the following settings.



Email interaction record page variant settings

Setting	Description
Active	Enabling the **Active** check box makes the page variant available to the selected audience. The Email Interaction record page variant is inactive by default. The active setting combined with the page order determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.

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Email interaction record page variant settings (continued)

Setting	Description
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Email interaction record page variant is -1001.
Conditions	Conditions determine when a page variant is displayed. The Email interaction record page variant has the following conditions: • **table = interaction**: Limits the use of the Email interaction page variant to records from the Interaction [interaction] table. • **csm.isEmailInteractionVisible = true**: <details>. If all of these conditions are met, the system displays the Email Interaction record page variant.
Audience	The audience determines who can see the page variant. The Email Interaction record page does not have a defined audience. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. In the Record section of the Pages and variants list, select **Email Interaction page**.
4. Select **Settings** at the top of the page.

Email Interaction record page components

The Email Interaction record page includes the following components.

Component	Description
Form heading	The form heading displays the interaction short description and record tags. Action buttons are located in the dock.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records.
Dock	The dock is a toolbar at the bottom of the page that displays minimized modeless dialogs, including emails, comments, and work notes. On the Email Interaction page, the dock also contains the following action buttons:

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Component	Description
	• **Close**: Closes the interaction record. • **Create Case**: Create records related to the interaction such as cases, incidents, requests, and consumers. • **Save**: Save changes to the interaction record. • **More Actions**: Perform additional actions such as starting a discussion and associating a record. **Note:** The specific actions available are determined by factors such as the user role and other attributes.
Contact and consumer lookup components	The lookup components display contact and consumer lookup cards on the left side of the page. Agents can use these cards to do the following: • Search for a contact or consumer by name, phone number, or email address. • Select a contact or consumer from the list of search results and link that card to the interaction record. The selected card replaces the lookup components. • Verify the contact or consumer. • Edit the information for a contact or consumer. • Unlink a contact or consumer. • Collapse or expand the contact or consumer card. For more information, see Lookup component.
Customer History component	The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component can also display live call transcript. **Note:** Live call transcript requires additional configuration.
Interaction details	The interaction details include information about the interaction including the account and contact, short description, and record state.
Activity stream	The activity stream displays activities in reverse chronological order with the newest activities appearing at the bottom and older activities at the top. This layout provides a natural conversation flow similar to messaging applications. Agents can use the activity stream to compose work notes or emails using the thin composer at the bottom of the activity stream.
Contextual side panel component	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Email Interaction record page includes the following tabs.

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Component	Description
	• Recommended Actions search • Related Lists • Attachments • Form Templates • Collaborate

Customer History component

The Customer History component appears below the Interaction Controls Component in the left panel. This component is included with the Customer Central plugin, which is activated as part of the CRM Workspace application.

The Customer History component includes the **Customer** tab. This tab displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab also includes a search field, filter, and date range selector that agents can use to find specific information in the history.

Customer tab information

Interaction record information	Customer tab information
Customer information is provided	When a customer is selected on the interaction record and customer history is available, the customer history is displayed in the Customer History tab. If customer history is not available, the Customer History tab displays a message that there is no activity yet.
Customer information is not provided	When a customer is not selected on the interaction record, the Customer History tab displays a message suggesting to link to a customer.
Account information is provided	When an account is selected on the interaction record, the account history is displayed in the Customer History tab.

Refreshing the customer history information:

- When an agent selects a different customer on the interaction record and then saves the record, the agent needs to select **Refresh** on the Customer History component to update the information. The agent can also refresh the record page.
- If there is new activity while the page is open, the agent needs to refresh the Customer History component or the record page to display the new activity in the Customer HIstory tab. For example, if the agent selects **Create Case** on the interaction record.

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Workspace dock

The workspace dock component provides agents with a centralized location where they can see all current drafts at a glance. The dock also contains the actions available to users while working on email interaction records.

> **Note:** The specific actions available are determined by factors such as the user role and other attributes.

- **Create**: Create records related to the interaction.
  - **Create Case**: Creates a new Case record in a sub tab and adds the record to the Related Tasks and Open Cases related lists.
  - **Create Incident**: Creates a new Incident record in a sub tab and adds the record to the Related Tasks related list.
  - **Create Request**: Creates a new Request record in a sub tab and adds the record to the Related Tasks related list.
  - **Create Problem**: Creates a new Problem record in a sub tab and adds the record to the Related Tasks related list.
  - **Create Consumer**: Creates a new Consumer record in a sub tab and adds the record to the Consumers list.
- **Save**: Saves changes to the interaction record.
- **Close**: Close the interaction record.
- **More Actions**: Perform additional actions such as starting a discussion and associating a record.
  - **Discuss**: Opens a pop-up window to start a Sidebar discussion.
  - **Associate Record**: Opens a new record in a sub tab that the agent can use to link a record to the current interaction. This new record is displayed in the Related Tasks related list.

The Email Interaction record page supports actions from the following Customer Service Management and CRM Workspace plugins:

- Case Management Core (com.sn_customerservice)
- CRM Workspace Core (com.snc.agent_workspace.csm)
- CRM Workspace (com.snc.uib.csm_agent_workspace)
- CRM Workspace Foundation (com.snc.uib.cwf_workspace)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, you need to add the actions from those plugins to the Email Interaction record page action bar. For more information, see the configuration steps in this topic: Configure the Front-line case page action bar.

Thin compose modeless dialogs

The thin composer is located at the bottom of the activity stream with the Email tab as the first tab. Agents can pop out the composer into a separate window called a modeless dialog.

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Drafts are created when agents add or modify content in the composer. Minimized modeless dialogs appear in the workspace dock.

For more information about modeless dialogs, see Thin compose modeless dialogs.

Contextual side panel component

The Email Interaction record page includes the contextual side panel component, which provides agents with the following functionality.

Email Interaction record page tabs in the contextual side panel

Tab	Description
Recommended Actions	The Recommended Actions tab is now available as the first tab in the contextual side panel and is enabled for Pro customers. It includes a set of base system recommendations, such as similar incidents and similar open incidents. The Recommended Actions tab includes AI search functionality and suggested actions. Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the interaction short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type. Depending on the source type, agents can do the following: • Open an article in full view in a sub tab. • Flag an article. • Mark an article as helpful. • Order a catalog item. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.
Related Lists	The Related Lists tab provides access the interaction related lists. The Email Interaction record 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. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format.

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Email Interaction record page tabs in the contextual side panel (continued)

Tab	Description
	The Email Interaction record page includes the following related lists: • Related Tasks • Recent Interactions • Open Cases
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.
Collaborate	The Collaborate component enables agents to communicate with stakeholders and other users and gather information for case resolution. For more information, see Collaborate component.

Email interaction tab notifications

Unread email counters display on email interaction tabs to help agents track new email activity across multiple interactions. When new emails arrive for an email interaction that's open in an inactive tab, an unread counter appears on the tab. The counter increments as additional emails arrive and clears when you select the tab.

For example, you have multiple email interactions open. A customer replies to an interaction in an inactive tab. The tab displays an unread counter (for example, "2"), so you can identify which interactions have new activity without losing context. For configuration requirements, see View unread email counters on interaction tabs.

CSM voice interaction record page

The CSM voice interaction record page provides a component that customers can use for integration with Contact Center as a Service (CCaaS) providers. This page provides an interface that agents can use to handle customer phone calls.

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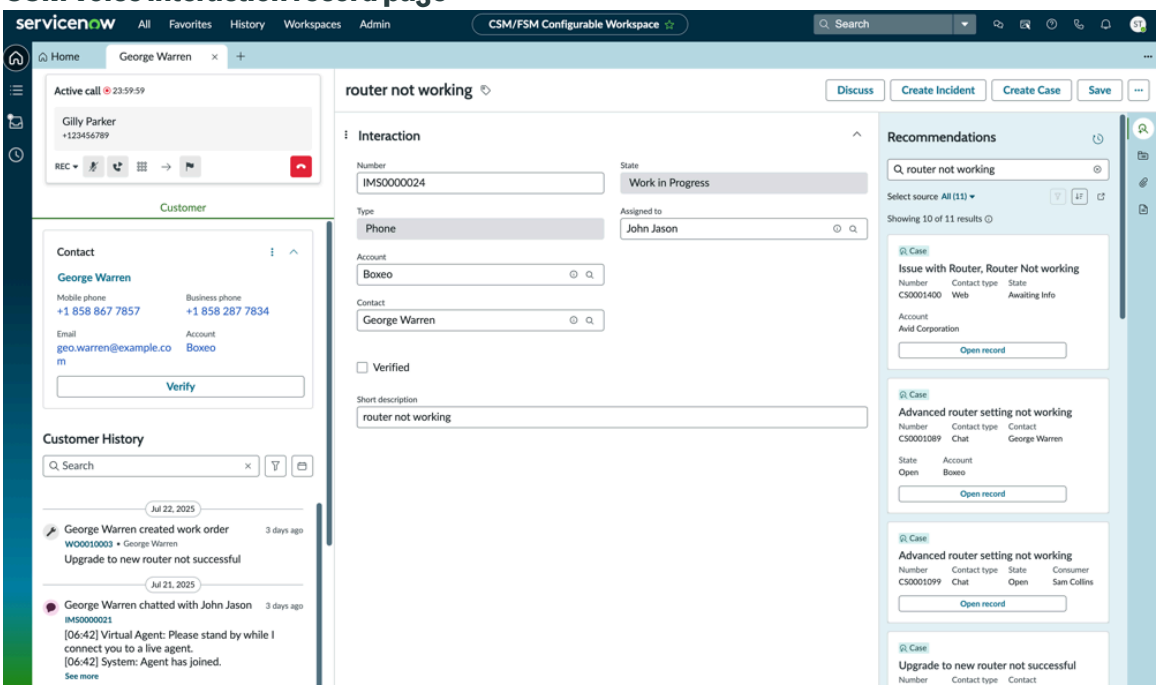
CSM voice interaction record page



The CSM voice interaction record page enables CCaaS providers to display native voice integrations in CRM Workspace. Using CCaaS call controls integrated in the page, agents can do the following:

- Accept calls directly from the agent inbox.
- Manage call transfers and conferences.
- Place calls on hold and on mute.

For more information about the integration with CCaaS providers, see Interaction Controls Component and OpenFrame configuration.

Page structure

The CSM voice interaction record page is made up of two different pages:

- CSM voice interaction record page
- Interaction control page

The pages appear together and are visible to agents for phone interactions when the OpenFrame configuration is enabled.

The Interaction control page appears in the left panel and includes the following components:

- Interaction Controls Component (ICC): Enables CCaaS providers to display native voice integrations.
- Customer History component: Displays customer, consumer, or account history information, depending on the customer information provided on the interaction record.
- Live call transcript: Displays the text of the call transcript when a conversation record is present for the interaction.

> **Note:** A live call transcript requires additional configuration.

The CSM voice interaction record page includes the following components:

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- Interaction form
- Action bar
- Contextual side panel component

Plugin

The CSM voice interaction record page template and page variant are included with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace).

The CSM voice interaction record page template and page variant are available to users when the Interaction Controls Component plugin (com.app_interaction_control) is installed.

The Interaction Controls Component plugin has the following dependencies:

- com.app_openframe_store
- com.sn_component_workspace_openframe

CSM voice interaction record template

The CSM voice interaction record template enables customers to create voice interaction record page variants and customize them as needed. This template includes customizable views for different CCaaS providers as well as real-time updates and notifications.

Record pages and page variants created with this template enable agents to manage phone calls with customers and external users. These pages and variants display information that helps agents to resolve issues. Use this template to customize and extend CSM functionality around phone interaction management. Additionally, you can configure a CCaaS provider to integrate features such as call transcript.

CSM voice interaction record page variant

The CSM voice interaction record page variant is included with the CRM Workspace plugin and has a dependency on the Interaction Controls Component plugin. This page variant is available for users with the interaction controls enabled. For more information, see OpenFrame configuration.

This page variant includes the following settings.

CSM voice interaction record page variant settings

Setting	Description
Active	Enabling the **Active** check box makes the page variant available to the selected audience. The CSM voice interaction record page variant is inactive by default. The active setting combined with the page order determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order that indicates the page priority. The lower the number, the higher the priority. The default order for the CSM voice interaction record page variant is -2000.

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CSM voice interaction record page variant settings (continued)

Setting	Description

Conditions	Conditions determine when a page variant is displayed. The CSM voice interaction record page variant has the following conditions:
	• **table = interaction**: Limits the use of the CSM voice interaction page variant to records from the Interaction [interaction] table.
	• **csm.interactionRecordValid = true**: Checks if the interaction record is available in the database.
	• **csm.interactionType = phone**: Checks if the **Type** field on the interaction record is set to phone.
	• **csm.interactiveControlsEnabled = true**: Queries the OpenFrame configuration record and checks the following:
	  ○ The **Enable interaction controls** field is enabled.
	  ○ The user belongs to the group selected in the **User Group** field.
	
	If all of these conditions are met, the system displays the CSM voice interaction record page variant.

Audience	The audience determines who can see the page variant. The CSM voice interaction record page doesn't have a defined audience. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. In the Record section of the Pages and variants list, select **CSM voice interaction record page**.
4. Select **Settings** at the top of the page.

CSM voice interaction record page components

The CSM voice interaction record page includes the following components.

Component	Description
Form heading	The form heading displays the interaction short description and also includes the action bar and record tags.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records.
Action bar	The action bar contains the actions available to users while working on phone interaction records.

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Component	Description
	• **Create**: Create records related to the interaction such as cases, incidents, requests, and consumers. • **Save**: Save changes to the interaction record. • **More Actions**: Perform additional actions such as starting a discussion and associating a record. **Note:** The specific actions available are determined by factors such as the user role and other attributes.
Interaction Controls Component (ICC)	The Interaction Controls Component enables CCaaS providers to display native voice integrations. Agents can then use the component to manage customer calls directly from their inbox. For more information, see OpenFrame configuration.
Contact or consumer lookup component	The **Customer** tab includes the contact or consumer lookup component, which agents can use to do the following: • Search for a contact or consumer. • Select a contact or consumer from the list of search results and link that contact or consumer to the interaction record. • Verify the contact or consumer. • Edit the information for a contact or consumer.
Customer History component	The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component can also display live call transcript. **Note:** Live call transcript requires additional configuration.
Interaction details	The interaction details include information about the interaction including the account and contact, short description, and record state.
Contextual side panel component	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the CSM voice interaction record page includes the following tabs. • Recommended Actions search • Related Lists • Attachments • Form Templates • Collaborate
Thin compose modeless dialogs	Enable agents to initiate a work note or email in the activity stream and then open the text in a modeless dialog.

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Component	Description
	Note: For the CSM voice interaction record page, the thin compose modeless dialogs feature is hidden by default and can be enabled by the administrator.

Interaction Controls Component (ICC)

The Interaction Controls Component appears at the top of the left panel of the CSM voice interaction record page. This component enables CCaaS providers to display native voice integrations. Agents can then use the component to manage customer calls directly from their inbox.

The CSM voice interaction record page with the ICC component is displayed when the following conditions are met:

- The interaction is of type phone.
- The **Enable interaction controls** field on the OpenFrame Configuration record is enabled.
- The agent belongs to the **User Group** selected on the OpenFrame Configuration record.
  - If a user group is selected on the configuration record, only agents belonging to that group can see the CSM voice interaction record page.
  - If no group is selected, all agents can see the CSM voice interaction record page.

This feature uses the Interaction table, which includes a reference to the Callback [sys_cs_callback] table. The Callback table, in turn, references the Callback Context table.

For more information about the integration with CCaaS providers, see the following topics:

- Interaction Controls Component
- OpenFrame configuration

Callback actions component

The Callback actions component appears at the top of the left panel on the CSM voice interaction record page when it's associated with a callback task. Agents can use this component to manage customer callback requests directly from the CRM Workspace.

The callback actions component contains:

- Callback number drop-down: Contains a list of all the contact numbers of the customer.
- Timer: Displays the time remaining before auto-dialing the number selected in the drop-down or automatically closing the task.
- Call number button: Enables you to call the number in the drop-down.
- Retry call: Enables you to redial the customer number when the customer doesn't answer the call.
- Close the callback button: Enables you to wrap up callback interactions.
- Enables you to transfer an ASAP or Scheduled callback to another queue or agent before the call to the customer begins. For more information, see Manage a CCaaS callback request in the Configurable Workspace.

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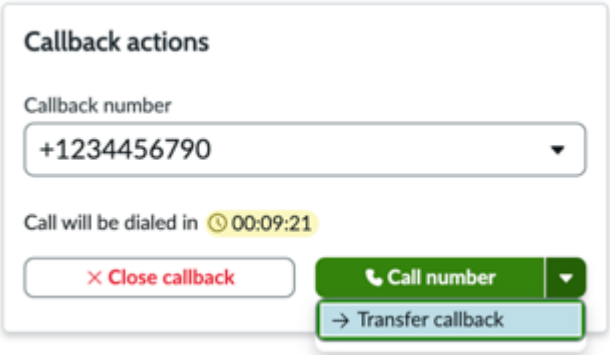
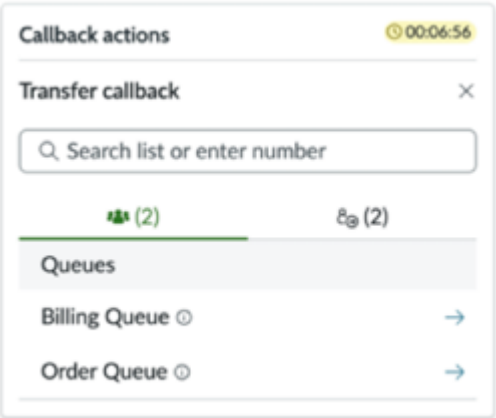
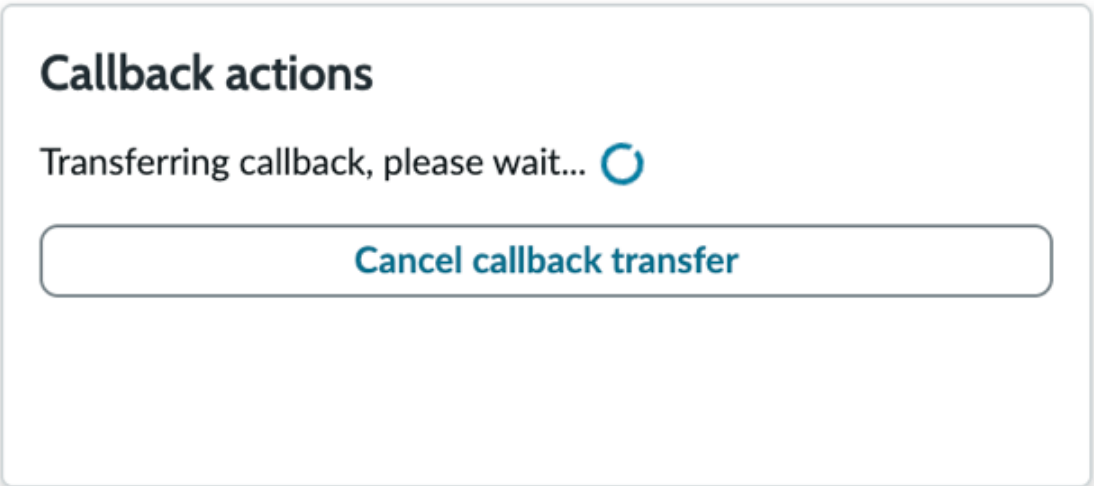
Callback actions component



Transfer callback subcomponent



Cancel callback transfer subcomponent



Callback context card

The CSM voice interaction record page includes the Callback context card at the center of the page.

The callback context card is displayed when an interaction record has a linked callback task.

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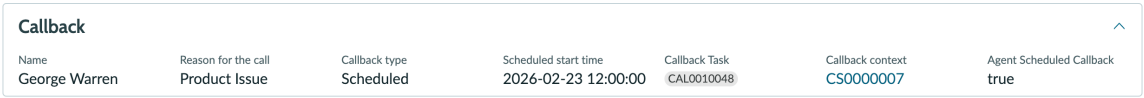
Callback context card



The callback context card includes the following information:

- Name
- Reason for the call
- Callback type: Scheduled or ASAP
- Scheduled start time
- Source channel (visible only in case of CCaaS callback)
- Queue (visible only in case of CCaaS callback)
- IVR Path (visible only in case of CCaaS callback)
- Callback Task
- Callback context

  Note: This field is visible in both the native and CCaaS callback environments when relevant information exists.

- Agent scheduled callback

  Note: This field is visible in both the native and CCaaS callback environments when relevant information exists.

Note: The Callback Task field is turned off by default.

In UI Builder, the callback context card is configured to use the Lookup component, which can be used to look up a record on any table in card format. It also uses a data resource that returns the callback task for the specific interaction.

For more information about the callback feature, see the following topics:

- Configuring Omnichannel Callback for Customer Service Management
- Using Omnichannel Callback for Customer Service Management
- Address a callback request from a customer

Customer History component

The Customer History component appears below the Interaction Controls Component in the left panel. This component is included with the Customer Central plugin, which is activated as part of the CRM Workspace application.

The Customer History component includes the **Customer** tab. This tab displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab also includes a search field, filter, and date range selector that agents can use to find specific information in the history.

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Customer tab information

Interaction record information	Customer tab information
Customer information is provided	When a customer is selected on the interaction record and customer history is available, the customer history is displayed in the Customer History tab. If customer history isn't available, the Customer History tab displays a message that there's no activity yet.
Customer information isn't provided	When a customer isn't selected on the interaction record, the Customer History tab displays a message suggesting to link to a customer.
Account information is provided	When an account is selected on the interaction record, the account history is displayed in the Customer History tab.

Refreshing the customer history information:

- When an agent selects a different customer on the interaction record and then saves the record: the agent must select **Refresh** on the Customer History component to update the information. The agent can also refresh the record page.
- If there's new activity while the page is open: the agent must refresh the Customer History component or the record page to display the new activity in the Customer HIstory tab. For example, if the agent selects **Create Case** on the interaction record.

Live call transcript

The Customer History component can be configured to display a **Call Transcript** tab, which shows the live call transcript.

- This tab displays the text of the call transcript when a conversation record is present for the interaction.
- This tab displays the following text when a conversation record isn't present for the interaction record: Call transcript not available yet.

The Call transcript tab is visible to users if configured in the provider application associated with the interaction.

Action bar component

The action bar component contains the actions available to users while working on phone interaction records.

Note: The specific actions available are determined by factors such as the user role and other attributes.

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- **Create**: Create records related to the interaction.
  - **Create Case**: Creates a Case record in a subtab and adds the record to the Related Tasks and Open Cases related lists.
  - **Create Incident**: Creates an Incident record in a subtab and adds the record to the Related Tasks related list.
  - **Create Request**: Creates a Request record in a subtab and adds the record to the Related Tasks related list.
  - **Create Problem**: Creates a Problem record in a subtab and adds the record to the Related Tasks related list.
  - **Create Consumer**: Creates a Consumer record in a subtab and adds the record to the Consumers list.
- **Save**: Saves changes to the interaction record.
- **More Actions**: Perform additional actions such as starting a discussion and associating a record.
  - **Discuss**: Opens a pop-up window to start a Sidebar discussion.
  - **Associate Record**: Opens a new record in a subtab that the agent can use to link a record to the current interaction. This new record is displayed in the Related Tasks related list.

The CSM voice interaction record page supports actions from the following Customer Service Management and CRM Workspace plugins:

- Case Management Core (com.sn_customerservice)
- CRM Workspace Core (com.snc.agent_workspace.csm)
- CRM Workspace (com.snc.uib.csm_agent_workspace)
- CRM Workspace Foundation (com.snc.uib.cwf_workspace)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you're using any additional plugins, you must add the actions from those plugins to the CSM voice interaction record page action bar. For more information, see the configuration steps in this topic: Configure the Front-line case page action bar.

Contextual side panel component

The CSM voice interaction record page includes the contextual side panel component, which provides agents with the following functionality.

CSM voice interaction record page tabs in the contextual side panel

Tab	Description
Recommended Actions	The Recommended Actions tab is now available as the first tab in the contextual side panel and is enabled for Pro customers. It includes a set of base system recommendations, such as similar incidents and similar open incidents.

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CSM voice interaction record page tabs in the contextual side panel (continued)

Tab	Description
	The Recommended Actions tab includes AI search functionality and suggested actions. Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the interaction short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type. Depending on the source type, agents can do the following: • Open an article in full view in a subtab. • Flag an article. • Mark an article as helpful. • Order a catalog item. For more information, see Use AI search in Recommended Actions to resolve cases. **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application.
Related Lists	The Related Lists tab provides access the interaction related lists. The CSM voice interaction record 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. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. The CSM voice interaction record page includes the following related lists: • Related Tasks • Recent Interactions • Open Cases
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates, which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a record such as an incident or change.

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CSM voice interaction record page tabs in the contextual side panel (continued)

Tab	Description
Collaborate	The Collaborate component enables agents to communicate with stakeholders and other users and gather information for case resolution. For more information, see Collaborate component.

OpenFrame configuration

The CSM voice interaction record page variant is included with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace). This page variant is available to users when:

- The Interaction Controls Component plugin (com.app_interaction_control) is installed.
- Interaction controls in the OpenFrame configuration are enabled.

Complete the following steps to enable interaction controls:

1. Navigate to **All** > **OpenFrame** > **Configurations**.
2. Select a configuration record. For example, select **CTI**.
3. Select the **Enable interaction controls** check box to enable interaction controls for OpenFrame.
4. Select a group from the available **User Group** column and move it to the **Selected** column. This is the group of users to whom the OpenFrame configuration applies.
5. Unlock the URL field, and add a third-party URL.

   You can get this URL from your contact center provider administrator.

6. Select **Update**.

When the following conditions are met, the agent sees the CSM voice interaction record page with the Interaction Controls Component and the Customer History tab component.

- The interaction is of type phone.
- The **Enable interaction controls** field on the OpenFrame Configuration record is enabled.
- The agent belongs to the **User Group** selected on the OpenFrame Configuration record.

The agent can switch between phone interactions and chat interactions. If an interaction is of type chat, the agent sees the CSM default record page.

Related topics

Manage a CCaaS callback request using Global Voice Control

CSM centered chat interaction record page

The CSM centered chat interaction record page provides a chat component in the center of the workspace that agents can use to handle customer chat conversations.

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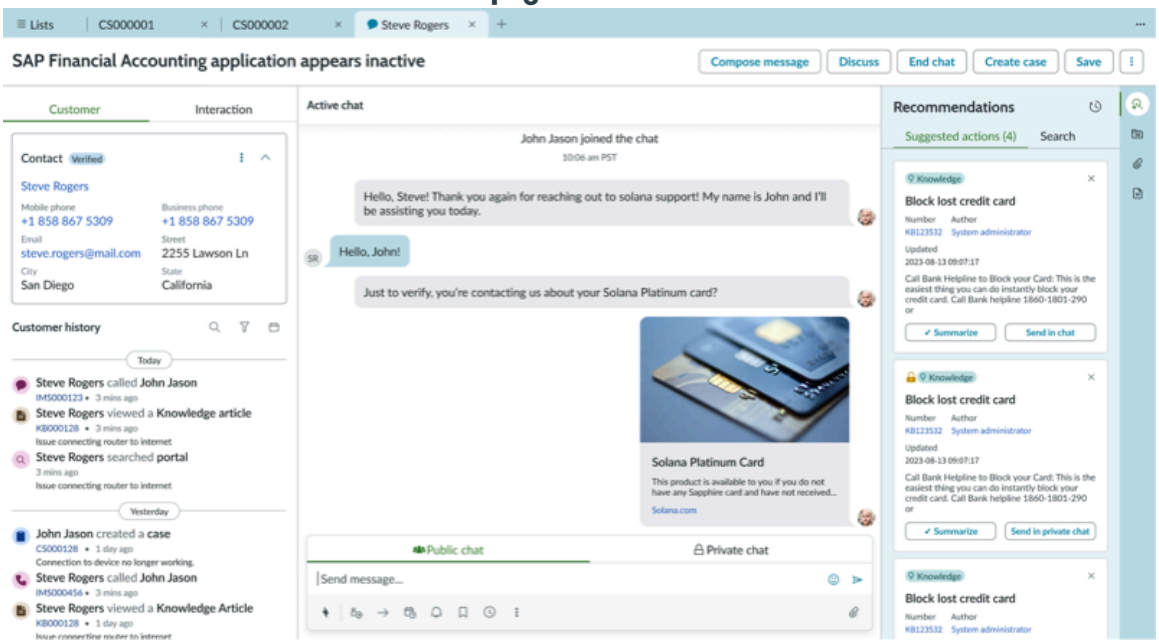
CSM centered chat interaction record page



To use the CSM centered chat interaction record page in CRM Workspace, enable the page and set the **Order** value. For more information, see Set record page order.

> **Note:** The CSM Interaction record page is the default experience for chat interaction. This page includes the chat component in the left panel.

Page structure

The CSM centered chat interaction record page contains three panels.

CSM centered chat interaction record page structure

Panel	Description

Left panel	The left panel includes two tabs: Customer and Interaction.
	
	The **Customer** tab includes the contact or consumer lookup component as well as customer history.
	
	• Contact or consumer lookup component:
	  ○ Includes the contact or consumer lookup card which agents can use to search for, select, and verify a customer.
	  ○ When a customer has been selected and linked to an interaction, a card with customer information is displayed at the top of the Customer tab.
	• Customer history: Includes the Customer History component, which displays customer, consumer, or account history information, depending on the customer information provided on the interaction record.
	
	The **Interaction** tab includes the Interaction record form fields.

Center panel	The center panel includes the chat component. This panel is hidden when there is no chat conversation.

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CSM centered chat interaction record page structure (continued)

Panel	Description
Right panel	The right panel contains the contextual side panel component, which includes the following tabs: • Recommended Actions search • Related Items • Attachments • Templates • Collaborate

Plugin

The CSM centered chat interaction page template and page variant are included with the CRM Workspace plugin (com.snc.uib.csm_agent_workspace).

CSM centered chat interaction record template

The CSM centered chat interaction record template brings the chat component to the center of the workspace and give agents greater visibility and access to customer chat conversations. This page view enables agents to manage chats and displays information, such as customer history and interaction details, that help agents to resolve issues.

Use the CSM centered chat interaction record template to create chat interaction record page variants and customize them as needed. For more information, see Creating pages and page variants.

CSM centered chat interaction page variant

The CSM centered chat interaction page variant includes the following settings.

CSM centered chat interaction page variant settings

Setting	Description
Active	Enabling the **Active** check box makes the page variant available to the selected audience. The CSM centered chat interaction record page variant is active by default. The active setting combined with the page order determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the CSM centered chat interaction record page variant is -2000.
Conditions	Conditions determine when a page variant is displayed. The CSM centered chat interaction record page variant has the following conditions:

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CSM centered chat interaction page variant settings (continued)

Setting	Description
	• **table = interaction**: Limits the use of the CSM centered chat interaction page variant to records from the Interaction [interaction] table. • **csm.isChatCenteredInteractionVisible = true**: Stores the result of the system's evaluation of the UX Page property that determines user roles. If these conditions are met, the system displays the CSM centered chat interaction record page variant.
Audience	The audience determines who can see the page variant. The CSM centered chat interaction record page has the following audience: **CSM - Front-line Agent**. This audience includes the sn_cwf_wrkspc.frontline_agent role. By default, agents who belong to the **CSM - Front-line Agent** audience will see the CSM centered chat interaction record page in CRM Workspace. This is the default for both new (zboot) and upgrade customers. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. In the Record section of the Pages and variants list, select **CSM centered chat interaction page**.
4. Select **Settings** at the top of the page.

CSM centered chat interaction record page components

The CSM centered chat interaction page includes the following components.

Component	Description
Form heading	The form heading displays the interaction short description and also includes the action bar and record tags.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records.
Action bar	The action bar contains the actions available to users while working on chat interaction records. • **Discuss**: Opens a pop-up window to start a Sidebar discussion. • **End Chat**: Ends the chat conversation.

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Component	Description
	• **Create Incident**: Creates an incident record related to the interaction. • **Create Case**: Creates a case record related to the interaction. • **Save**: Saves changes to the interaction record. • **More Actions**: Perform additional actions such as creating a request or associating a record. **Note:** The specific actions available are determined by factors such as the user role and other attributes.
Contact or consumer lookup component	The **Customer** tab includes the contact or consumer lookup component, which agents can use to do the following: • Search for a contact or consumer. • Select a contact or consumer from the list of search results and link that contact or consumer to the interaction record. • Verify the contact or consumer. • Edit the information for a contact or consumer.
Customer History component	The Customer History component displays customer, consumer, or account history information, depending on the field selections on the interaction record. This component can also display live call transcript. **Note:** Live call transcript requires additional configuration.
Interaction details	The interaction details include information about the interaction including the account and contact, short description, and record state.
Contextual side panel component	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the CSM centered chat interaction record page includes the following tabs. • Recommended Actions search • Related Items • Attachments • Templates • Collaborate
Thin compose modeless dialogs	Thin compose modeless dialogs enable agents to initiate a work note or email in the activity stream and then open the text in a modeless dialog.

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Component	Description
	Note: For the CSM centered chat interaction record page, the thin compose modeless dialogs feature is hidden by default and can be enabled by the admin.

Customer History component

The Customer History component appears below the Interaction Controls Component in the left panel. This component is included with the Customer Central plugin, which is activated as part of the CRM Workspace application.

The Customer History component includes the **Customer** tab. This tab displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab also includes a search field, filter, and date range selector that agents can use to find specific information in the history.

Customer tab information

Interaction record information	Customer tab information
Customer information is provided	When a customer is selected on the interaction record and customer history is available, the customer history is displayed in the Customer History tab. If customer history is not available, the Customer History tab displays a message that there is no activity yet.
Customer information is not provided	When a customer is not selected on the interaction record, the Customer History tab displays a message suggesting to link to a customer.
Account information is provided	When an account is selected on the interaction record, the account history is displayed in the Customer History tab.

Refreshing the customer history information:

- When an agent selects a different customer on the interaction record and then saves the record: the agent needs to select **Refresh** on the Customer History component to update the information. The agent can also refresh the record page.
- If there is new activity while the page is open: the agent needs to refresh the Customer History component or the record page to display the new activity in the Customer HIstory tab. For example, if the agent selects **Create Case** on the interaction record.

Action bar component

The action bar component contains the actions available to users while working on chat interaction records.

- **Discuss**: Opens a pop-up window to start a Sidebar discussion.
- **Create Case**: Creates a new case record.
- **End Chat**: Ends the chat conversation.

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- **Save**: Saves changes to the interaction record.
- **More Actions**: Perform additional actions such as creating a request or associating a record.
  - **Create Consumer**: Creates a new Consumer record in a subtab.
  - **Create Request**: Creates a new Request record in a subtab and adds the record to the Related Tasks related list.
  - **Associate Record**: Opens a new record in a subtab that the agent can use to link a record to the current interaction. This new record is displayed in the Related Tasks related list.

Note: The specific actions available are determined by factors such as the user role and other attributes.

The CSM centered chat interaction record page supports actions from the following Customer Service Management and CRM Workspace plugins:

- Case Management Core (com.sn_customerservice)
- CRM Workspace Core (com.snc.agent_workspace.csm)
- CRM Workspace (com.snc.uib.csm_agent_workspace)
- CRM Workspace Foundation (com.snc.uib.cwf_workspace)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, you must add the actions from those plugins to the CSM centered chat interaction record page action bar. For more information, see the configuration steps in this topic: Configure the Front-line case page action bar.

Contextual side panel component

The CSM centered chat interaction record page includes the contextual side panel component, which provides agents with the following functionality.

CSM centered chat interaction record page tabs in the contextual side panel

Tab	Description
Recommended Actions	The Recommended Actions tab is now available as the first tab in the contextual side panel and is enabled for Pro customers. It includes a set of base system recommendations, such as similar incidents and similar open incidents. The Recommended Actions tab includes AI search functionality and Suggested Actions. • **AI search** tab: Agents can use AI search to find relevant resources or resolutions for customer issues. The search feature displays an initial set of search results based on the text in the interaction short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search. From the list of search results, agents can select a source to see search results of that type. For more information, see Search

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CSM centered chat interaction record page tabs in the contextual side panel (continued)

Tab	Description
	sources and guidance actions on the CSM Interaction page for chat channel . For all the other source types, the default guidance is supported. The default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances. For more information on default guidance, see Default guidance for search results. For more information, see the following topics: ○ Enable AI search in Recommended Actions ○ Use AI search in Recommended Actions to resolve cases **Note:** Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspace application. • **Suggested Actions** tab: This tab displays relevant actions to agents based on a context of a record or recommend a value for a field. For more information on how to configure contexts so that relevant recommendations are displayed for the agents, see Recommended Actions.
Related Lists	The Related Lists tab provides access the interaction related lists. The CSM centered chat interaction record 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. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. The CSM centered chat interaction record page includes the following related lists: • Related Tasks • Recent Interactions • Open Cases
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.
Collaborate	The Collaborate component enables agents to communicate with stakeholders and other users and gather information for case resolution. For more information, see Collaborate component.

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The following table shows the actions that an agent can perform on the search results of various source types:

Search sources and guidance actions on the CSM Interaction page for chat channel

Search sources	Guidance actions
Knowledge base article	• Send an article link in chat. • Copy an article link to the article. • Read an article. • Flag • Mark an article as helpful.
Cases	• Show or copy a resolution for resolved cases. • Link or open a case.
Incidents	• Link an incident. • Open an incident.
Problems	• Link a problem. • Open a problem.
Requests	• Link a change request. • Open a change request.

Set record page order

Set the order value of a record page to determine the default page for displaying records in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Record pages can be active or inactive. Each record page also has an order value. The active record page with the lowest order number is the default page. When the system displays a record in CRM Workspace, it uses this default page to display the record information.

Record page order values

Record page	Order
CSM default record page	-1000
CSM Interaction record page	-1000

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Record page order values (continued)

Record page	Order
Email interaction record page	-1001
Front-line case page	1000
CSM voice interaction record page	2000
CSM centered chat interaction record page	-2001
Record default	0
Interaction record Page	100

To use a different page as the default page, you need to manually switch from the existing page to the new page by changing the page order value.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **CRM Workspace** experience.
3. Select the desired page in the Variants list, for example, **CSM default record page**.
4. Set the page order value.
   a. Select the additional actions menu for the page and then select **Edit conditions**.
   b. Enter a value in the **Order** field.
   c. Select **Save**.
5. Activate the page.
   a. Navigate to **All** > **Now Experience Framework** > **Experiences**.
   b. Select the **CRM Workspace** experience.
   c. In the **Admin panel** field, open the UX App Configuration: CRM Workspace App Config record.
   d. Locate the page in the UX Screens related list.
   e. Set the **Active** field to true.

Related topics

CRM Workspace record pages

CRM Workspace components

Content pages in CRM Workspace, such as record pages, are made up of reusable components that display information or enable agents to complete tasks.

Action bar

The action bar contains the actions available to agents while working on case records. This includes buttons on the action bar and menu items in the More Actions menu. Each record page contains a set of actions that have been configured for that specific page.

The action bar can also contain action groups which combine multiple actions in the same button. For example, the Front-line case page includes the Create action group which displays a drop-down list with the available actions.

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Typical actions available in the action bar include:

- **Create**: Create records such as work orders, incidents, and requests.
- **Manage case**: Perform case management actions such as accepting a case or requesting information.
- **Save**: Save changes to the case record.
- **Follow**: Receive notifications when comments or work notes are added to the record. When selected, the button toggles to **Unfollow**.
- **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap.

Note: The specific actions available are determined by factors such as the user role, case state, and other attributes.

Task SLA cards component

The Task SLA cards component displays the status of one or more Service Level Agreements (SLAs) for the current record in card format. The Task SLA cards component can display multiple SLAs. The cards are displayed in a carousel with horizontal navigation. If more than one SLA card is present, agents can use arrows to scroll through the cards. For more information, see Task SLA cards component.

Task activity timeline controller and preset

The timeline uses icons to display record events and colors to show ranges of time, such as when a case is with the agent or the customer. Agents can use the timeline in the following ways:

- Zoom in and out.
- Select the **Show details** toggle to display more information.
- Hover over the icons to show tool tips.

For more information, see Task activity timeline preset and controller.

Record List component bundle

The Record List component bundle is a list component bundle that uses a dedicated controller to configure list actions such as sorting, filtering, and grouping.

The Record List component bundle includes a record list header with declarative actions and pagination control for navigating list pages.

Starting with the Zurich release, CRM Workspace record pages use the Record List component bundle. This list component bundle is the default experience for both new (zboot) and upgrade customers.

For more information, see the following topics:

- Record List Overview in the ServiceNow Developer documentation
- Record List on the Horizon design system website

Upgrade information

The default declarative actions included with CRM Workspace record pages work with the Record List component bundle.

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Customer declarative actions that open a modal on the list page require some configuration to work with the Record List component. See the example below for details.

To continue using the previous list bundle component in place of the Record List component bundle:

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the UX Screen [sys_ux_screen] table.
3. Search for and select **List bundle default** in the Screen Name column.
4. Set the **Active** field to false and select **Update**.

Example

This example uses the Customer Service Case Types application, which includes multiple page variants under a single route. This example details the steps needed to configure a customer declarative action for **Create Case** that opens a modal on the list page:

- Create the mapping for a declarative action to open a modal.
- Make the modal available on the list bundle component.

Step 1: Create the mapping for a declarative action to open a modal.

1. Navigate to the UX Add-on Event Mapping [sys_ux_addon_event_mapping] list.
2. Search for the **Create Case** event mapping name by filtering the Target Event column: LIST#OPEN_MODAL.
3. Select **Create Case** for the event that creates a case on list view.
4. Right-click the form header and select **Insert and Stay** to create a new event mapping record. This creates a new record to the existing source declarative action.
5. Fill in the following fields on the event mapping form:
   - Name = <Enter a unique name>
   - Source Component = Record List Header
   - Controller = List Controller
   - Target Event = Open modal

   For more information, see Create a UX add-on event mapping.
6. Select **Submit**.

Step 2: Make the modal available on the list bundle component.

To make the modal available, add it to the List Page Modals page collection.

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Open the CRM Workspace experience.
3. Select **List (List bundle default)** in the experience header.
4. In the content tree on the left side, select **List Viewport Modal**.
5. In the Configure tab on the right side, select the icon in the **Page collections** field to display the List page modals page collection.
6. Create a page under the page collection. For example, create a page called create_case.

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a. Select the **+** icon next to Pages and variants and then select **Create a new page**.

b. Add a name in the **Name** field and select **Continue**. For example, add create_case as the name.

c. Select **Build responsive** and then select **Create**. The create_case page is added to the list of pages and variants for the page collection

For more information, see Page collections.

7. Go to the app route record and change the screen collection to point to the existing screen collection. For example, the Create Case screen collection.

a. Select **Settings** for the create_case page to open the general page settings.

b. In the Actions field, select **Open records** and then select **Page collection**. This displays the List page modals extension point form.

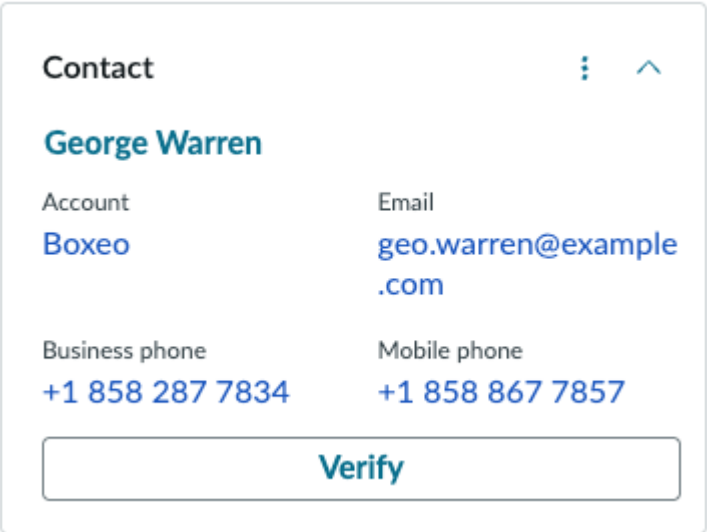
c. In the create_case app route record, add the required **Fields** parameters: table,sysId.

d. Set the **Screen Collection** field on the create_case app route record to **Create Case** and then select **Update**.

Lookup component

Use the lookup component on interaction record pages in CRM Workspace to look up, link, and verify a contact or consumer on an interaction record.

Lookup and verify contact card



The lookup component is available on the following interaction record pages:

- CSM centered chat interaction record page
- CSM voice interaction record page
- Email interaction record page

Note: For some of these interaction record pages, the Lookup component replaces the Lookup & Verify component that was formerly available in the contextual side panel.

For more information about the component usage and configuration, see Lookup in the Next Experience Components documentation.

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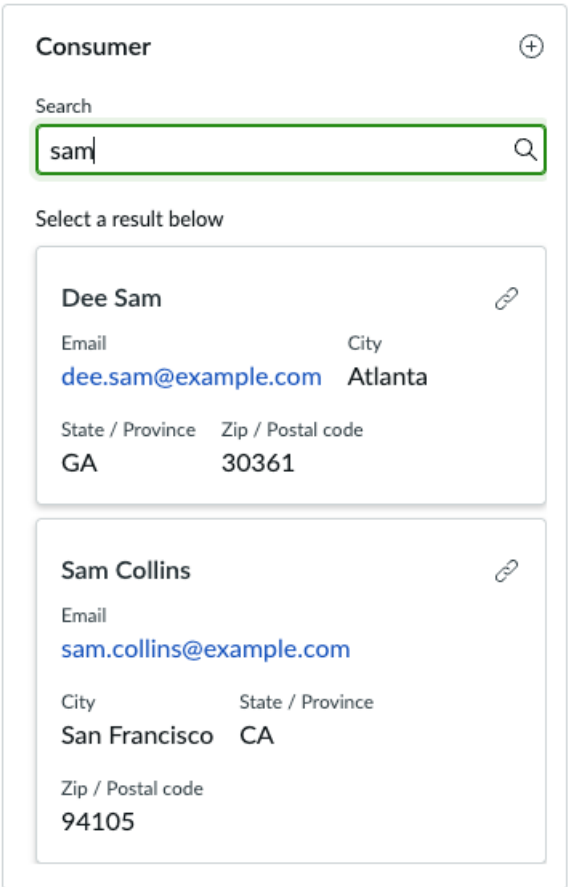
Using the lookup component

Customer service agents can use the lookup component to search for and select a customer, either a contact or consumer, and link that customer to the interaction record.

Linking a customer displays the customer information in a contact or consumer card on the interaction record. After linking a customer to the record, agents can verify the customer.

Using the lookup component

Task	Description
Search for a contact or consumer	Enter information in the **Search** field on the lookup card such as a name, email address, phone number, or record number. The lookup card displays a list of search results based on the search term. **Lookup and verify search** 
Link a contact or consumer to the interaction record	Select the Link icon ( ) on a customer card from the list of search results to link the selected customer with the interaction record.
Verify a contact or consumer	Verify the customer by selecting **Verify** on the lookup card. The system displays the Verified tag in the card header. If the customer is already verified, the system hides the **Verify** button.

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Using the lookup component (continued)

Task	Description
	Note: If an agent creates a customer record from the lookup component, the system creates and verifies the customer at the same time.
Create a contact or consumer	Create a customer record by selecting the Create new (⊕) icon in the lookup card header. The system displays a new contact or consumer record. Enter information in the relevant fields and select **Save**. **Note:** If an agent creates a customer record from the lookup component, the system creates and verifies the customer at the same time.
Edit a contact or consumer	Make changes to the linked customer information by selecting the More actions (⋮) menu on the lookup card and then selecting **Edit**. The system displays the contact or consumer record fields. Make changes to the desired fields and then select **Save**. The system saves the changes to the contact or consumer information and updates the same fields on the interaction record.
Unlink a contact or consumer	Select the More actions (⋮) menu on the lookup card and then select **Unlink** to remove a contact or consumer from an interaction record.
Collapse or expand the lookup card	Select the up and down arrows on the lookup card to expand and collapse the card. When expanded, agents can see the customer details. When collapsed, agents can see more content below the card.

Contact lookup card

The contact lookup card includes the following information:

- Name
- Mobile phone
- Business phone
- Email
- Street
- City
- State/Province
- Account

Consumer lookup card

The consumer lookup card includes the following information:

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- Name
- Business phone
- Mobile phone
- Home phone
- Email
- Street
- City
- State/Province

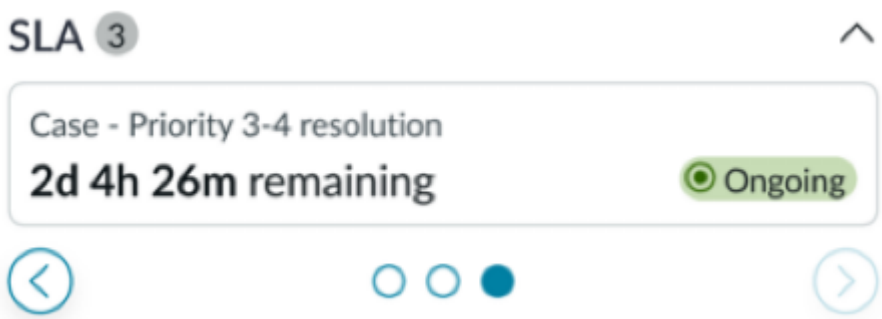
Task SLA cards component

The Task SLA cards component displays the status of one or more Service Level Agreements (SLAs) for the current record in card format.

The Task SLA cards component can display multiple SLAs. The cards are displayed in a carousel with horizontal navigation. If more than one SLA card is present, agents can use arrows to scroll through the cards. Within the Task SLA cards component, the case SLA card appears first followed by case task SLA cards.

Note: When there are no active SLAs, the Task SLA cards component isn't shown.

Task SLA cards component



The Task SLA cards component is available on the Front-line case page in the contextual side panel. The SLA cards appear in the Record Information tab below below the record information card.

The SLA cards display a visual presentation of SLA information that agents can use to check quickly where they are in the life cycle of the SLA.

- The SLA card header appears at the top of the card and includes a counter with the number of active SLAs for the case.
- The SLA name is displayed below the SLA card header.
- The remaining time is displayed below the SLA name.
- Agents can expand and collapse the Task SLA cards component by selecting the chevron icon in the SLA card header.
- Tags on the SLA card indicate the SLA status and either the time remaining or the time elapsed since reaching the Breached state:

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- **Ongoing**: Is displayed when an SLA starts (green background).
- **At risk**: Is displayed when 25% of the SLA time is remaining (yellow background).
- **Breached**: Is displayed when an SLA is violated (red background). This tag is displayed in both the SLA card expanded and collapsed states.

Task activity timeline preset and controller

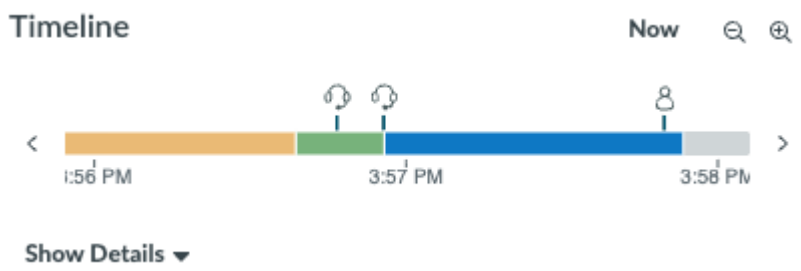
Use the Task activity timeline preset and controller to add the Timeline component as a standalone component on task record pages such as case or incident.

The timeline uses icons to display record events and colors to show ranges of time, such as when a case is with the agent or the customer. Agents can use the timeline in the following ways:

- Zoom in and out.
- Select the **Show details** toggle to display more information.
- Hover over the icons to show tool tips.

For more information about the timeline features, see CRM Workspace form ribbon and components.

Timeline component with Task activity timeline preset and controller



The Timeline component is available in the UIB toolbox. This component displays activities for task-based records such as cases or incidents in a timeline view. It uses the resolution shaper configuration to automatically fetch and organize your data.

To add the Timeline component to a record page as a standalone component, the admin can select the **Task activity timeline preset and controller** and complete the component configuration. For more information, see the following topics:

- Add the Timeline component as a standalone component
- Enable the Timeline component to refresh

Collaborate component

Use the Collaborate component in CRM Workspace to communicate with stakeholders and gather information for case resolution.

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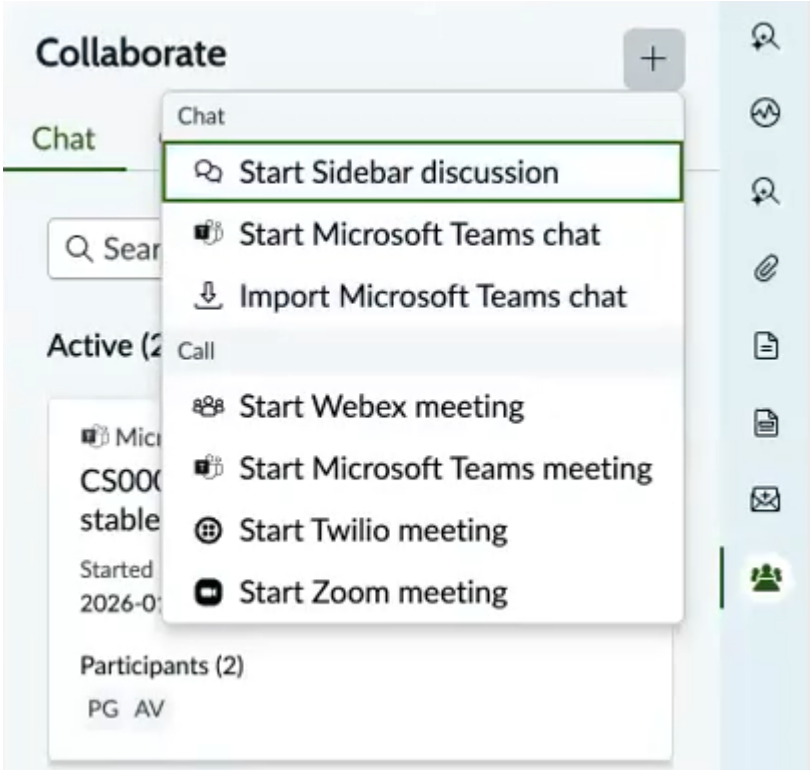
Collaborate component with multiple configured communication services



Customer service agents can use the Collaborate component to initiate chats and calls with other agents, requestors, and subject matter experts.

The Collaborate component requires configured integrations with communication services such as Microsoft Teams, Slack, and Zoom. When no integrations have been configured, agents can use the Collaborate component to start Sidebar discussions.

The Collaborate component is available as the last tab in the contextual side panel in CRM Workspace. The Collaborate component is available on all CRM Workspace record pages where the table is set to one of the following:

- Interaction [interaction]
- A child of the Task [task] table, such as the Case table [sn_customerservice_case]

Users with the sn_uib_collab.user role can see the Collaborate component on workspace pages. This role is included with the interaction_agent role, which is included with the sn_esm_agent role.

Collaborate component features

The Collaborate component includes two tabs: Chat and Calls. These tabs show the active and completed chats and calls in card format.

Note: When no integrations have been configured, the Collaborate component displays the Chat tab and includes the **Start Sidebar discussion** option. Agents can select this option to start a Sidebar discussion.

The component also includes the following:

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- An Add (+) icon that agents can use to initiate new chats and calls. The selections available in this menu depend on the configured integrations, such as Microsoft Teams and Zoom.
- Search bar: use to quickly find a chat or call.
- Filter icon: use to filter and sort the conversations.

Collaborate component integrations

The Collaborate component requires configured integrations with communication services such as Microsoft Teams, Slack, and Zoom. For more information, see Collaboration services.

The Collaborate component includes the Sidebar feature. Agents can collaborate with others through Sidebar discussions. For more information, see the following topics:

- Exploring Sidebar
- Sidebar and Microsoft Teams
- Using Sidebar

The Collaborate component can also be configured to use different communication tools such as Microsoft Teams or Zoom. Agents can see the available configurations by selecting the Add icon.

Collaborate component extension points

Customers can implement the following extension points to customize conditions for visibility of the Call and Chat tabs in the Collaborate component:

- sn_uib_notify.NotifyUIBVisibility
- sn_uib_collab.ContextualPanelVisibility

Set up CRM Workspace

Set up and configure CRM Workspace for your agents so they can engage with customers, answer questions, create cases, and resolve issues.

The CRM Workspace setup and configuration topics include information about the workspace's core capabilities, configuration options, and details for tailoring the experience to meet your specific business requirements.

Prerequisite information

Before setting up and configuring CRM Workspace, complete the following setup tasks:

- Set up your environment: Set up your foundation data and access management, including customer data, product data, and user roles.
- Enable your communication channels: Set up your communication channels, such as chat, email, and phone, so customers can contact you through their preferred methods.
- Set up case routing and work assignment: If cases should be automatically assigned to agents or groups, set up Advanced Work Assignment (AWA). You can use this application to route cases to the appropriate agents.
- Familiarize yourself with UI Builder: This tool is a web user interface builder that you use to create or customize pages for workspace experiences.
- Ensure that you have valid CSM licenses and user roles in place.

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Activating CRM Workspace

Activating the Case Management Core plugin (com.sn_customerservice) provides the CRM Workspace functionality. To activate this plugin:

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Search for the plugin by name (Case Management Core) or plugin ID (com.sn_customerservice).
3. Select the plugin card and then select **Install** to begin the installation process.

   The system displays a message when the installation is complete. For more information about the components installed with the Customer Service plugin, see Find components installed with an application.

Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the global domain. Otherwise, the following error appears:

```
Application installation is unavailable because another
operation is running: Plugin Activation for <plugin name>.
```

Accessing CRM Workspace

Navigate to the CRM Workspace in one of the following ways:

- Navigate to **All** > **Workspace Experience** > **Workspaces** and then select CRM Workspace.
- Select **Workspaces** and then select CRM Workspace.
- Select **Favorites** and then select CRM Workspace (after creating a favorite by selecting the star next to the workspace name in the workspace header).

Configuration tasks

This section describes how you can configure the baseline CRM Workspace to meet your unique needs.

1. Configure branding and theming.

   Themes enable you to tailor the visual workspace experience for your users. Use the Theme Builder application to create themes that reflect your company's brand.

   You can configure and publish multiple themes and designate a default theme. Agents can choose their preferred theme from the available options.

   The following video demonstrates how you can create and manage your themes using Theme Builder.

   https://vimeo.com/1137797867/9ad8860991?fl=pl&fe=cm

2. Configure the landing page.

   The landing page is the initial view that an agent sees when they open their workspace. You can modify the baseline landing page as needed to enhance usability for your agents.

   For more information, see Create a CRM Workspace landing page.

3. Configure the new record action.

   The new record action (the **+** button on the tab) enables agents to quickly create records.

   Note: The action to create an interaction record is available by default.

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4. Configure service catalogs.

   Service catalogs enable agents to submit requests on behalf of customers directly from within CRM Workspace.

5. Configure lists.

   List categories and lists enable agents and managers to quickly find records. You can modify the baseline workspace list categories and lists to better suit the needs of your agents or you can create your own.

6. Configure record pages.

   A record page provides the base structure for displaying records in CRM Workspace. Record pages include containers, components, and layouts to display record information. Several record pages are available in the baseline implementation. You can use these pages as is or customize as needed,

   For more information, see the following topics:

   - Creating pages and page variants
   - Record pages

7. Configure form headers.

   Form headers in CRM Workspace provide a quick glance of case, account, or contact information. You can configure the primary and secondary values that appear in the form header.

8. Configure UI actions on forms.

   Form actions enable users to perform common tasks directly from the form. Custom form actions can be configured as needed. For example, use form actions to update record fields, navigate to related records, or trigger other operations.

9. Configure the form ribbon and components.

   The form ribbon displays information that provides agents with a quick overview of the case details. For example, the form ribbon can include summary information about the contact or consumer, the case timeline, and SLA details.

10. Configure the form layout.

    You can configure the layout of a record form as needed. For example, you can add or remove fields that appear on the form, determine field visibility, or add new sections to the form.

11. Configure tabs in the contextual side panel.

    The contextual side panel includes different tools that agents can use to research and resolve customer issues. You can add, rearrange, or hide tabs as well as set default values. You can also hide tabs in the contextual side panel.

12. Configure Customer Central.

    Customer Central provides agents with all of the information about a customer in one central place. This information is provided in two views:

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- **Customer Information**: Displays key information about the customer and a view of all recent customer touch points with the service organization.
- **Customer History**: Displays all the recent customer touch points with the service organization in the form of an activity feed.

Set up CRM Workspace using guided setup

You can set up CRM Workspace by using the Customer Service Management Guided Setup. To use the guided setup:

1. Navigate to **Customer Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** on the Welcome page.
3. Scroll through the list of guided setup categories until you reach the CRM Workspace category.
4. Select **Get Started** in the CRM Workspace category.

   The CRM Workspace category includes one task for the Configurable Workspace Guided Setup.

5. Select **Configure** to go to the Configurable Workspace Guided Setup.
6. Select **Get Started**.

The Configurable Workspace Guided Setup includes a sequence of workspace configuration tasks.

Configurable Workspace configuration tasks

Task	Description
Branding and theming	A theme sets the visual style of a configurable workspace experience and provides a consistent look and feel across all pages. • View the brand and theme setting in your workspace experience • Working with themes in Next Experience
Tab Settings	Configure the following in the Tab Settings category: • Configure a New Record menu by adding a table that agents can select to create new records in a configurable workspace. • Select a Service Catalog for your agents to use with a configurable workspace.
Lists	Configure list categories, filtered lists, and tailor lists to show specific items by user role in a configurable workspace. • Create list categories • Create filtered lists
Forms	Configure the way forms appear for your agents or workers in a configurable workspace. You can also configure the fields that appear on the form to be different depending on the record

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Configurable Workspace configuration tasks (continued)

Task	Description
	type and user roles. For more information, see Administering forms for Configurable Workspace.
Additional Forms Configuration	Configure templates that agents can use to pre-populate fields and UI actions to make a configurable workspace more interactive. For more information, see Administering forms for Configurable Workspace.
Search	Define search sources that your agents can query in a configurable workspace. Agents can use these keywords to search for specific records or knowledge articles. • Configuring search in Next Experience • AI search in Recommended Actions
Configurable Workspace Notifications	Determine the conditions when notifications display in a configurable workspace, such as when a record updates or a record assigns to a user.
Advanced Work Assignment (AWA)	Set up Advanced Work Assignment to automatically route tasks and interactions to the right agents.
Configurable Workspace Agent Chat	Configure Agent Chat to enable live agents to chat with customers and manage various conversation features for agents and end users. For more information, see Setting up Agent Chat.
Playbook	Playbooks display business process workflows in a simple task-oriented view. These step-by-step procedures guide users through workflows that address commonly encountered situations. For more information, see Building Playbooks.

Configuring workspace pages in UI Builder

You can use UI Builder to configure the pages and components that display information in CRM Workspace including the following:

- Landing pages
- Record pages
- Customer Central – Customer Information tab

For more information, see the Manage UI Builder pages and page variants topic in the UI Builder documentation.

Set up communication channels and routing

Enable agents to chat with customers or to receive and place customer calls. You can also set up routing that automatically directs chats to the appropriate agents. For more information, see Setting up Agent Chat.

Set up additional CRM Workspace components

Complete these tasks to set up the components that are specific to CRM Workspace.

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Additional CRM Workspace configuration tasks

Task	Description
Create or modify a landing page	The landing page is an agent's initial view of the workspace. The CSM Landing Page is included with the Customer Service plugin. You can modify this landing page or you can create and modify a page variant in UI Builder.
Set up a ribbon configuration in CRM Workspace	The form ribbon includes components that display information about a record. You can add the Customer 360, Timeline, and SLA components to the Case form ribbon. You can also configure attributes for the Customer 360 and Timeline components.
Set up a form header in CRM Workspace	Configure form headers that provide a quick summary of case, account, or contact information.
Set up a highlighted value in a form header in CRM Workspace	Configure fields that appear as highlighted values in form headers in CRM Workspace.
Set up a form action in CRM Workspace	Create form actions that link to UI actions so that you can use the UI actions in CRM Workspace.
Display the form ribbon and form header secondary values in the Contextual side panel	Configure the form ribbon and the secondary values that appear in a form header to display in the Contextual side panel in CRM Workspace.
Display field values as interaction record tab titles	Display field values, such as contact or consumer names, as titles on interaction record tabs in CRM Workspace.
Hide tabs in the contextual side panel	Use the `inlineTabExclusion` UX page property to prevent tabs from appearing in the configurable side panel in CRM Workspace.
Configure service catalogs for CSM workspaces	Customer service agents use service catalogs to fulfill catalog item requests. You can configure the Service Workspace Portal to use the catalogs that contain the desired items.

Related topics

Activate Customer Service Management

Plan your CRM Workspace configuration

Planning your CRM Workspace configuration includes defining your key goals, personas, and requirements. This planning ensures that your configuration directly supports your business objectives and delivers the right experience to each user group.

Define goals and KPIs

Key performance indicators (KPIs) are performance measurements of business services or activities. These measurements, taken at regular intervals, result in a series of indicator scores over time.

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As part of your planning, clearly define the key performance indicators (KPIs) that you are optimizing for. Your KPIs should directly inform the workspace design and configuration decisions. Some KPIs to consider could include improving first contact resolution rates, reducing average handle time, and increasing CSAT scores.

As you set up your workspace components such as lists, landing pages, and contextual side panel, ensure that each element aligns with your identified goals. For instance:

- KPI goal: Reduce the average resolution time for high-priority cases.
- Workspace design: Incorporate a gauge visualization on the landing page to display the percentage of cases that met service level agreements (SLAs) over the past seven days.

Define personas

Define the personas who will be using the workspace. In a workspace, audiences can be defined to accomplish certain goals, and different versions of pages can be presented for different personas.

For instance, customer service agents and case managers both use the workspace but have different priorities. You can create separate landing page variants for each persona:

- Agent landing page: Displays assigned cases and individual performance metrics.
- Manager landing page: Displays team-level analytics and the team's cases.

With this approach, you can make sure that each persona sees the most relevant information for their role.

Gather configuration requirements

Review the baseline experience and identify what needs configuration to meet your goals. Multiple customization options are available when setting up features for your CRM Workspace.

The following tape provides the key decisions that for the most common workspace features.

Configuration considerations (updates)

Feature	Decision	Leading practices/Consideration
Branding and theming	Do you want your workspace to match your brand?	A theme sets the visual style of a workspace experience and provides a consistent look and feel across all pages. • Choose colors suited for an effective agent experience and in line with your overall branding strategy. • Adhere to logo size and acceptable format guidelines. For more information see:

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Configuration considerations (updates) (continued)

Feature	Decision	Leading practices/Consideration
		• View the brand and theme setting in your workspace experience • Working with themes in Next Experience
Landing page	Do you want to update the headers, containers, or widgets on the landing page?	<add intro>. • The information on the landing page should be relevant to the logged-in user. • Consider the key metrics and condensed data views that the user needs to see regularly.
Tab settings: New record menu	Are new record menus needed for other tables, such as Contact or Case? (The + button that enables an agent to create a new record.)	• Use Interaction as an entry point for case creation. Capture initial triage information separately and provide for first time-resolutions that don't need a subsequent task (such as a case, incident, or request) to be created. • User must have create access to the table(s) for the button to appear on their records menu in the workspace. • Include only those tables that are most frequently used by agents, such as Case and Interaction.
Service catalogs	• Will agents use service catalogs to create requests on behalf of customers? • Which service catalogs need to be added to the service portal to enable this?	• Consider the holistic agent experience, including case, incident, and request management, to define an effective process. • Encourage self-service by customers. Agents creating requests on behalf of users should be for exceptional scenarios.

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Configuration considerations (updates) (continued)

Feature	Decision	Leading practices/Consideration
Lists	• Are new list categories and lists required? • Do existing list categories and lists need to be removed? • Are access controls needed for lists for specific roles or groups? • Disable the New button on the List view? • Are UI notifications required when a record is updated?	Configure list categories, filtered lists, and tailor lists to show specific items by user role in a configurable workspace. • The order of list categories and lists should make sense to the logged-in users. • Remove unwanted lists and list categories to avoid information overload. • If UI notifications are required for record updates, define the recipients and the trigger conditions.
Form headers	For each form: • Is a header required? • If yes, which fields should be included in the header?	• Form headers are optional. • Headers provide information that agents can see at a glance. • Review the existing headers in the baseline workspace experience and update as needed.
UI actions	For each form: • Are updates required to existing actions? • What additional actions do agents need?	• Focus on actions used by agents. • Leverage actions provided in the baseline workspace experience. • If custom actions are needed, use correct scripting meant for workspace.
Ribbon	Do you need to add or change the ribbon widgets displayed for Case records? If yes, specify the following information: • Data table • Widget • Width	In the in the baseline workspace experience, the ribbon includes three widgets: Customer 360, SLA, and Timeline. • To choose suitable widgets, identify the data frequently required by agents to

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Configuration considerations (updates) (continued)

Feature	Decision	Leading practices/Consideration
	• Attributes • Placement	be more effective and productive. • The total ribbon width is 12 units. Divide the width between the widgets based on volume of information they contain. Train your agents on the ribbon widgets to drive its usage.
Ribbon widgets	Customer 360: • Provide primary user tables to be displayed (for example, Contact or Consumer). • Provide primary user fields to be displayed (for example, Name or Phone). • Provide secondary fields to be displayed. Timeline: Specify which task states denote that the task is awaiting customer response.	• Customer 360: Fill out secondary fields so that the widget isn't empty when primary user details are missing. • Timeline: Educate agents that not updating task states correctly will impact calculations in this widget. • SLA: Train agents to interpret colors for SLAs that are approaching breach limits.
Contextual side panel	For each record page: • What will the agents need to access quickly? • Which tables or related records are involved? • Should it be enabled or disabled for specific types of case forms?	Display frequently referenced information that might often take the agent out of the workspace
Form layout	The overall structure of the record page displayed in the workspace, including the arrangement of tabs, sections, and components. • Which tabs and sections are needed on the form? • Should sections be collapsible or mandatory?	• Group related fields logically to improve agent understanding. • Keep important fields higher on the page for visibility. • When possible, reuse baseline layouts to ensure consistency.

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Configuration considerations (updates) (continued)

Feature	Decision	Leading practices/Consideration
Form templates	Which form templates do you need? Form templates can pre-populate fields, provide conditions that need to be met, user and group access, and other requirements.	• Identify the fields most used by agents and use form templates to automate manual input. • Identify tables with standard fields that can be pre-populated (For example, Order or Major Case).
Lookup and verify	• Do you want to use the Lookup and verify feature? If yes, for which customers (for example, Contact or Consumer). • Is caller verification done prior?	Consider using automated authentication methods for enabling the **Verify** check box in the Lookup and verify feature.
Search sources: AI Search in Recommended Actions	• Configure the Recommended Actions component to include AI Search. • Map search sources with guidance inputs for accurate results.	AI Search for Recommended Actions displays relevant search results as cards in the contextual side panel. Recommended Actions is the default for the Front-line case record page and Chat interaction record page. This default provides access to AI Search and Genius results and single-click attach capability.
Search sources: Genius results	Do you want to enable Genius results? If yes, configure the Recommended Actions component to include Genius results.	Genius results provide AI-driven, contextually relevant answers and actions.
Customer Central	• Specify information to be displayed in 'Customer Information': reports, lists, records. • Any updates required to 'Customer Activity' tab?	• Pick critical customer information that agents will need quick access to • To keep the view refreshed with accurate information, configure the number of days to display data for

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Configuration considerations (updates) (continued)

Feature	Decision	Leading practices/Consideration
Major case management	• Do you want Major Case Management to be accessible from the workspace? • Any updates required to lists, filters, fields, process and access-control for it?	• Ensure major case managers do not need to use both, classic UI and workspace, spoiling their overall user experience • Use manager-specific lists and form layout to avoid displaying excessive information more relevant for agents.

Remaining configuration considerations

Configuration considerations

Task	Description
Search	Define search sources that your agents can query in a configurable workspace. Agents can use these keywords to search for specific records or knowledge articles. • Configuring search in Next Experience • AI search in Recommended Actions
Configurable Workspace notifications	Determine the conditions when notifications display in a configurable workspace, such as when a record updates or a record assigns to a user.
Advanced Work Assignment (AWA)	Set up Advanced Work Assignment to automatically route tasks and interactions to the right agents.
Configurable Workspace Agent Chat	Configure Agent Chat to enable live agents to chat with customers and manage various conversation features for agents and end users. For more information, see Setting up Agent Chat.
Playbook	Playbooks display business process workflows in a simple task-oriented view. These step-by-step procedures guide users through workflows that address commonly encountered situations. For more information, see Building Playbooks.

Using AI Search with CRM Workspace

Use the ServiceNow® AI Search application with CRM Workspace.

Starting with the Utah release, the AI Search application replaces the Zing search application for CRM Workspace. To support this feature, the Zing search configurations have been migrated to AI Search.

Use the Unified Navigation search field in CRM Workspace to search for information. You can switch between global search results and results from the CRM Workspace application. The different search configurations are based on different tables.

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For more information about using AI Search with CRM Workspace, see AI Search for Next Experience.

Search application configurations

A search application configuration specifies the search engine and the settings to use for search in a ServiceNow AI Platform application. The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CRM Workspace store app.

To access this configuration, navigate to **AI Search** > **Search Experience** > **Search Applications**.

AI Search indexed sources

Indexed sources reflect what content users are able to search on. The CRM Workspace store app adds AI Search indexed sources for the following tables:

- Account [customer_account]
- Case [sn_customerservice_case]
- Consumer [csm_consumer]
- Contact [customer_contact]
- Order Line Item [csm_order_line_item]
- Order [csm_order]
- Catalog item [sc_cat_item]

Navigation tabs

Navigation tabs appear at the top of the search results page and are static filter options that you can use to filter the results by indexed source. The **[CSM AIS] Configurable Workspace Search Config** search application configuration includes the following navigation tabs:

- All
- Cases
- Accounts
- Contacts
- Consumers
- Orders
- Order Line Items
- Locations

For information about creating navigation tabs, see Configure navigation tabs in an AI Search application configuration.

Facets

Facets are dynamic filter options that you can use to refine the search results by field value. The **[CSM AIS] Configurable Workspace Search Config** search application configuration includes the following facets:

- State
- Priority
- Assignment Group

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- Product
- Account
- Contact
- Consumer
- Needs Attention
- Action Status
- Channel
- Active Escalation

For information about creating facets, see Create a facet in an AI Search application configuration.

Guided setup

Guided setup provides a sequence of tasks that helps you configure search application settings. To access guided setup, navigate to **All** > **AI Search** > **AI Search for Next Experience** > **Guided Setup for Zing to AI Search Migration**.

This guided setup tool assists with the migration of Next Experience applications from Zing to AI Search. For more information about using guided setup, see Configuring AI Search for Next Experience.

Depending on your release, you may need to perform only some of the tasks within the guided setup to use AI Search with CRM Workspace. For Utah zBoot instances, AI Search is the default search application for global search and the CRM Workspace application.

Migrating Zing search configurations

If you have added, modified, or deleted any search configurations provided out of box, you may need to migrate existing Zing search configurations to AI Search configurations.

- If you have added or modified any search sources in **Agent Workspace Search Config**, you need to migrate these sources to AI Search.
- If you have deleted any search sources from **Agent Workspace Search Config**, you need to manually delete them from **[Migrated] Agent Workspace Search Config**

Enable fuzzy matching in AI search

Fuzzy matching enables agents to search for records using partial record IDs or incomplete record details and retrieve relevant results. Fuzzy matching identifies similar but not identical elements in data table sets.

AI search in CRM Workspace supports fuzzy matching with a script. Activating the Case Management Core plugin (com.sn_customerservice) automatically runs the script and enables fuzzy match search in both the CRM Workspace global search and the Recommended Actions AI search component.

When fuzzy matching is enabled:

- AI search returns results based on approximate matching, including partial text or slightly mistyped record IDs.
- The system ranks the search results in order of relevance, prioritizing exact matches but including close matches.

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After fuzzy matching is enabled, the system adminisrator needs to re-index the tables used in AI search:

1. Make sure that fuzzy matching is enabled by running this command as a background script:

   ```
   gs.info(new sn_ais.AisUtil().isFuzzyNumberMatchEnabled());
   ```

   The result should be 'true'.

2. Make sure that AI search is enabled.
3. Navigate to **All** > **AI Search** > **AI Search Index** > **Indexed Sources**.
4. Select the table to re-index.
5. Select **Index All Tables**.
6. Go to the homepage and enter a search query in the global search field.

   You should see fuzzy matching results for the tables that were re-indexed.

Note: If a table is not present in the AI Search Index Sources list, you can add the table by selecting **New** on this list.

Related topics

Exploring AI Search

Configuring AI Search

Open the CRM Workspace experience in UI Builder

Access the CRM Workspace experience in UI Builder for editing.

Before you begin

Role required: ui_builder_admin, admin

About this task

Procedure

1. In the navigation filter, navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Experiences** tab.
3. Select the CRM Workspace experience.

Result

The CRM Workspace experience opens in UI Builder.

Create a CRM Workspace landing page

Create landing pages for different agents and teams by creating a page variant and adding or modifying containers and components.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

A landing page is the page that an agent sees when they open their workspace. One landing page for CRM Workspace is included with the Case Management Core plugin (com.sn_customerservice). This page, the CSM Landing Page, gives agents an overview of their new, assigned and high priority cases, plus the cases assigned to their groups.

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You can create a variant of this page in UI Builder, a web user interface builder, and modify it as needed.

Note: It is important to create a variant of the CSM Landing Page to prevent issues with upgrades.

For example, you can use UI Builder to perform these tasks:

UI Builder tasks

Task	Description
Change the page layout	The layout governs the slots that are available on a page, how the slots are positioned, and what CSS rules apply to them. For more information about layouts and layout systems, see Work with layouts.
Add components to the page	Components are the base elements of your page. Components range from core elements like buttons and labels to more complex experience components like lists and forms. For more information, see Work with components. **Note:** You can also find information about UI Builder components on the ServiceNow developer site. For more information, see the component documentation on `www.devportaldocs.service-now.com/`.
Connect data resources to the components	Connect data resources to dynamically expose data from tables, records, or other elements on your page. For more information, see Work with data resources.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the **My experiences** section, select CRM Workspace.
3. In the Page drop-down menu, select **Landing Page**.
4. In the Variants list, select **CSM Landing Page**.
5. Create a landing page variant.

   a. Select the additional actions menu next to the **CSM Landing Page** variant and then select **Duplicate variant**.

   b. In the Create a variant pop-up window, add a **Variant name**.

   c. Select **Create**.

   d. If desired, specify the audience and display conditions for the page variant.
   The audience determines who can see the page. An audience is a collection of user roles. For more information, see Understanding your audiences.

   The **Order** field determines which page is displayed. The page with the lowest order number is displayed first.

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e. Select **Save**.
The system displays the landing page variant you created in the Landing Page section in UI Builder. The **Audience** and **Order** settings determine which landing page is displayed for any given persona.

6. Add or modify containers and components for the landing page variant.
See the UI Builder documentation for details about adding or modifying containers and components.
   - Add components to a page: Beginning with step 4, use this task to add a component to a container and to configure the component properties and event handlers. This task also contains information about adding additional containers.
   - Add styling to a component: Beginning with step 3, set CSS styles for a component to change its default appearance.
   - Add a modal to a component: Beginning with step 5, add a window that appears when a user selects a component. For example, if you add a button component that deletes a record, you can add a modal that asks the user to confirm the record deletion.
7. Select **Save** to save the changes to the page variant.
You can see the landing page variant in the **Landing Page** section in UI Builder.

Configure a new record action

The new record action at the main tab level in CRM Workspace enables agents to quickly create records.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

The create record action appears as the **+** button on the main tab in CRM Workspace. Agents can select this tab to create records.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. From the list of UX applications, select CRM Workspace.
3. Select the UX Page Properties related list on the UX Application (CRM Workspace) record.
4. Select **chrome_tab** in the Name column.
5. In the **Value** field, add a new JSON object in the newTabMenu array.
The default code passes an array of buttons with labels in JSON format that are configured to create a record in the Interaction or Incident tables. You can add, modify, or delete the elements through the array passed for newTabMenu.

   The following example shows the general syntax to add a button for new record creation in any table.

```
{
"label":{
"translatable":INSERT_true_OR_false_BOOLEAN_VALUE_WITHOUT_QUOT
ES,
 "message":"INSERT_LABEL_NAME_TO_BE_DISPLAYED_ON_PLUS_BUTTON"
},
"routeInfo":{
"route":"record",
```

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```
"fields":{
"table":"INSERT_TARGET_TABLE_NAME",
"sysId":"-1"
},
"multiInstField":"sysId"
}
}
```

Note:

- Make sure that you add the comma either before or after the array to follow valid JSON format practices.
- sysId = -1 points to the new record being created on the table as Target_Table_Name.

The following example shows how to add one more button to create a record in the Case table (sn_customerservice_case).

```
{
"label":{
"translatable":true,
"message":"New Case"
},
"routeInfo":{
"route":"record",
"fields":{
"table":"sn_customerservice_case",
"sysId":"-1"
},
"multiInstField":"sysId"
}
}
```

6. Save the changes to the UX Application (CSM Landing Page) record.

Configure service catalogs

Service catalogs enable agents to submit requests on behalf of customers directly from within CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Using service catalogs, agents can quickly initiate service requests during customer interactions without leaving the workspace.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Select **Service Workspace Portal**.
3. Select the Catalogs related list and then select **Edit**.

   Note: If you are unable to select the Catalogs related list, make sure you are in the Service Catalog - Service Workspace application.

4. Select and add the desired catalogs to the Catalogs list.

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For example, add Customer Service.

5. Select **Save**.

Result
The system displays the catalog items belonging to the configured service catalogs in CRM Workspace.

Configure a CRM Workspace list

List categories and lists enable agents and managers to quickly find records. Configure a list to display the right information for your intended audience.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
You can configure the baseline lists and list categories as needed: create or delete list categories and lists and adjust the display order. For each list, you can also select the columns that are visible and specify the intended audience.

Procedure

1. Navigate to the UX List Menu Configurations list by entering **sys_ux_list_menu_config.LIST** in the application navigator and pressing **Enter**.
2. Select the **CRM Workspace List Menu Config**.
   You can use the UX List Categories and UX Lists related lists to update your categories and lists as needed. The following steps walk you through the process of creating a list.
3. In the UX Lists related list, select **New**.
4. Fill out the fields on the UX List record and select **Save**.
5. To select an audience for the list, navigate to **All** > **Now Experience Framework** > **Building Blocks** > **Audiences**.
6. Create an audience for your list if one doesn't already exist.
7. Associate the audience to the list.
   a. Navigate to the List Applicabilities list by entering **sys_ux_applicability_m2m_list.LIST** in the application navigator and pressing **Enter**.
   b. Select **New** to create a List Applicability record.
   c. Select a list in the **List** field.
   d. Select an audience in the **Applicability** field.
   e. Select **Submit**.

Note:

- The system does not display list categories that don't have one or more associated lists.
- The **Order** field determines the order in which list categories and lists are displayed.

Set up a ribbon configuration in CRM Workspace

Create a ribbon setting and add that setting to a ribbon configuration for CRM Workspace.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

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About this task

The form ribbon displays information that provides agents with a quick overview of the case details. Agents can also use links in the ribbon to create email messages or place phone calls.

Use the steps in this task to set up a ribbon configuration for CRM Workspace.

- Create a ribbon setting, such as creating another version of the Customer 360 ribbon component.
- Add the ribbon setting to a ribbon configuration.
- Set the width and the order of the ribbon setting within the ribbon configuration.

One ribbon configuration, CRM Workspace Ribbon Config, is included with CRM Workspace. This configuration includes the Customer 360, Timeline, and Active SLA ribbon components. You can use this configuration in the base system without completing any additional configuration steps.

Procedure

1. Create a ribbon setting.

   a. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Ribbon Setting**.

   b. Select **New**.

   c. Fill in the fields on the Ribbon Setting form.

Ribbon Setting form fields

Field	Description
Name	A label that describes this ribbon setting. It often includes the table associated with this ribbon.
Ribbon component	The component to add to the ribbon setting, including Customer360, Timeline, Active SLA, or a custom ribbon component. **Note:** You can only add one component at a time. To make a second component appear in the ribbon, repeat this procedure to create another ribbon setting and add a different component.
Table	The table associated with this ribbon setting. Anytime an agent selects a record from this table, the ribbon setting appears with this component.
Width	The number of columns that the component occupies in the ribbon. The width of the page is 12 columns. When using multiple components, the total combined width of all the components must equal 12 or less. **Note:** For CRM Workspace, set the width of the ribbon component on the Ribbon Configuration Setting form (see step 3).

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Field	Description
Application	The scope of this ribbon. Global means the ribbon works with all applications.
Order	The location of this component in the ribbon. Ordering the components goes from left to right. For example, if you associate three components with a table, the component with the lowest order appears on the left and the component with the highest order appears on the right. **Note:** For CRM Workspace, set the order of the ribbon component on the Ribbon Configuration Setting form (see step 3).
Active	Toggle to turn this component on or off in the ribbon for this table.
Inherit	If set to true, the ribbon configuration can be inherited by child tables. For this to be effective, a child table shouldn't have any configured ribbon settings. The **Inherit** field is false by default.
Experience restricted	If set to true, the ribbon component is restricted to configurable workspaces. If set to false, the ribbon component is global and appears in CSM Agent Workspace (legacy). This field is set to true by default.

d. Select **Submit**.

2. Create a ribbon configuration as a container for your ribbon setting.

a. Navigate to **Now Experience Framework** > **Configuration Settings** > **UX Ribbon Configurations**.

b. Select **New** and fill in the fields on the UX Ribbon Configurations form.

UX Ribbon Configurations form fields

Field	Description
Name	Unique name for this ribbon configuration.
Application	The scope of this ribbon configuration. Global means the ribbon works with all applications.
Active	Toggle to turn this component on/off in the ribbon for this table.

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Field	Description
Description	Short description of this ribbon configuration that displays in the UX Ribbon Configurations list.

c. Select **Submit**.

3. Add the ribbon setting to the ribbon configuration.

a. Navigate to **Now Experience Framework** > **Configuration Settings** > **Ribbon Configuration Settings**.

b. Select **New** to create a ribbon configuration and add the ribbon setting to the configuration.

c. Fill in the fields on the Ribbon Configuration Setting form.

Ribbon Configurations Settings form fields

Field	Description
Table	The table associated with this ribbon setting. Anytime an agent selects a record from this table, the ribbon setting appears with this component.
Ribbon	The ribbon setting to add to the ribbon configuration.
Configuration	The desired ribbon configuration.
Application	The scope of this ribbon. Global means the ribbon works with all applications.
Order	The location of this component in the ribbon. Ordering the components goes from left to right. For example, if you associate three components with a table: ▪ The component with the lowest order appears on the left. ▪ The component with the highest order appears on the right.
Width	The number of columns the component occupies in the ribbon. The width of the page is 12 columns. When using multiple components, the total combined width of all the components must equal 12 or less. **Note:** The width is ignored if the ribbon is configured to display in the contextual side panel.
Active	Toggle to turn this component on/off in the ribbon for this table.

d. Select **Submit**.

What to do next

You can display the form ribbon at the top of the form or in the Contextual side panel. For more information, see the following topics:

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- CRM Workspace form ribbon and components
- Display the form ribbon and form header secondary values in the Contextual side panel

Set up a highlighted value in a form header in Customer Service Workspace

You can configure fields that appear as highlighted values in a form header in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

After creating a highlighted value, you must link it to a highlighted value configuration if you want it to appear in CRM Workspace.

Note: You can also use highlighted values from CSM Agent Workspace in CRM Workspace if you link the value to the highlighted value configuration.

One highlighted value configuration, **CSM/FSM Configurable Workspace Highlighted Value Config**, is included with CRM Workspace. You can use this configuration out of the box without completing any additional configuration steps.

Procedure

1. Create a highlighted value.

   a. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Highlighted Values**.

   b. Select **New**.

   c. Fill in the fields on the Highlighted Value form and select **Submit**.

Field	Description
Table	Table that contains the field that you want to highlight in the form header.
Field	Field that you want to highlight.

   d. In the Highlighted Values list, select the record you created.

   e. In the Highlighted Value Conditions related list, select **New**.

   f. Fill in the fields on the Highlighted Value Condition form.

Field	Description
Conditions	Condition builder where you can set the conditions for your highlighted value to display.
Status	Background color. Each status has its own color, for example, Critical displays a red background, Moderate displays a purple background, and Info displays a blue background.

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Field	Description
Show icon	Toggle that makes a small circle display in addition to the background coloring.
Value Override	Text that renders instead of the Status value. For example, instead of "Critical," you can display, "Address this immediately." You can reference a text value using `{{value}}`.
Application	Application scope that contains the record.
Order	Order that the highlighted values are evaluated.

g. Select **Submit**.

2. Add the highlighted value to the highlighted value configuration.
   a. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Highlighted Values Configurations**.
   b. Select the configuration.
   c. In the Highlighted Values related list, select **Edit**.
   d. Move the desired value from the left column to the right column to add it to the selected configuration.
   e. Select **Save**.

Related topics

Configure a highlighted value for a form header

Set up a form header in CRM Workspace

You can create a form header for use in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Form headers in CRM Workspace provide a quick glance of case, account, or contact information. They include a primary value and several secondary values. You can configure the information that appears in the form header for the Case, Account, and Contact forms. You can also configure the placement of the secondary values.

After creating a form header, you must link it to a form header configuration if you want it to appear in CRM Workspace.

One form header configuration, CRM Workspace Header Config, is included with CRM Workspace. You can use this configuration without completing any additional configuration steps.

Procedure

1. Create a form header.
   a. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.
   b. Select **New** on the Form Headers list.

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c. Fill in the fields on the Form Header form.

Field	Description
Table	Table that is associated with this form header. Whenever an agent selects a record from this table, this form header appears.
Primary field	Field that appears on the top of the form header and acts like the title of the record. Normally, the field is unique and descriptive, such as **short_description**. This field helps the agent understand what the record is about.
Subheading	Value displayed on the form header that is dependent on the Table selection.
Header Image	Image to display on the workspace form header from an image field. Header images give context to records. They can be set to show agent avatars, differentiate between domains, etc. **Note:** Header images are can only be selected from user image files.
Hide Tags	Toggle to hide tags.
Ignore Highlight	Toggle to turn off (selected) highlighting in the form header for fields configured to be highlighted.
Application	Scope of this setting's applicability. Global means that all workspaces can use this setting.
Workspace	Workspace that is associated with this form header.

d. Select **Submit**.

2. Add the form header to the form header configuration.

a. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Header Configurations**.

b. Select the header configuration.

c. In the Workspace Form Headers related list, select **Edit**.

Note: You may need to configure the form to display the related list.

d. Move the desired form header from the left column to the right column to add it to the header configuration.

e. Select **Save**.

3. Configure the placement of the secondary values in the form header.

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a. Navigate to **All** > **Now Experience Framework** > **Experiences** > **CRM Workspace.**.

b. In the UX Page Properties list, select the form header property.
For example, select **configHeaderId** to display the page property form. The **Value** field determines the placement of the secondary values.

c. Enter the location of the secondary values in the **Values** field.
   - **sidebar**: The secondary values appear in the contextual side panel.
   - **header**: The secondary values appear in the header along with the primary value.

d. Select **Save**.

Related topics

Configure a form header for a workspace

Set up a form action in CRM Workspace

Create a form action that links to a UI action so that you can use the UI action in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

To use UI actions in CRM Workspace, each UI action must have a corresponding form action.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **Form Actions**.
2. Select **New**.
3. Fill in the following fields on the Action Assignment form.

Field	Description
Action label	The name of the action. For example, Create or Save.
Action name	This field populates automatically with the ac tion label in all lowercase and with spaces re placed with underscores.
Implemented as	Select one of the following: ○ Server Script: Applies the action to the serv er or database as JavaScript. ○ UXF Client Action: Applies the action as a UI Builder page event. ○ Client Script: Applies the action to the web browser as JavaScript.
Table	Select a table for the action button to appear on.
View	Select a UI view for the action button to ap pear on.

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4. Select the Additional Actions icon and select **Save**.
5. From the Layout Items related list, select your action to display the UX Form Actions Layout Item record.
6. Complete the following fields to update the look and feel of the action.

Field	Description
Icon	Select an icon for the action.
Color	Select a color for the action. You have access to choose any color the button component supports.

7. Select **Update**.

Configure the form layout

Configure the layout of a record form as needed. For example, add or remove fields that appear on the form, determine field visibility, or add new sections to the form.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

You can configure the form layout from within CRM Workspace.

Procedure

1. Select your profile picture in the workspace header.
2. Select **Configure Page** > **Form Layout** from the drop-down menu.
   You can choose to edit the form using Form Builder or within the Core UI.
3. Ensure that the view name is set correctly before editing the form.
4. Make the desired changes to the form and select **Save**.

Display the form ribbon and form header secondary values in the Contextual side panel

Configure the form ribbon and the secondary values that appear in a form header to display in the Contextual side panel in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Note: This task applies to CRM Workspace.

The form ribbon includes components that provide agents with an overview of case details, such as a customer summary and a case timeline.

The form header for the Case form can display two levels of field values from the Case table. The primary value is the case short description. The secondary values include the account and contact or consumer, the case priority, and the case state.

You can use properties to determine where the form ribbon and secondary values are displayed: at the top of the record or in the Contextual side panel. Two properties are available for the standard record page and two are available for the interaction record.

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These properties can operate independently. For example, you can display the form ribbon in the Contextual side panel and the secondary values in the form header.

Note: The form ribbon properties apply to pages that have active ribbon configurations. If a page does not have a ribbon configuration, or has an inactive ribbon configuration, there is no information for the system to display in either location.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences** and select CRM Workspace.
2. In the UX Page Properties list, select the desired property.

Property	Description
ribbonLocation	Controls where to display the form ribbon on a standard record page: header or sidebar. For example, the Case record page. Default is sidebar.
record_secondary_values_location	Controls where to display the form header secondary field values on a standard record page: header or sidebar. For example, the Case record page. Default is sidebar.
ribbonLocation_interaction	Controls where to display the form ribbon on an interaction record: header or sidebar. De fault is sidebar.
interaction_secondary_values_location	Controls where to display the form header secondary field values on an interaction record: header or sidebar. Default is sidebar.

3. In the **Value** field for the selected property, enter one of the following values.

Value	Description
header	Displays the selected component in the fol lowing location: ○ Ribbon: at the top of the record. ○ Secondary values: at the top of the record, in the form header below the primary value.
sidebar	Displays the selected component in the Con textual side panel.

4. Select **Update**.

Display field values as interaction record tab titles

Display field values, such as contact or consumer names, as titles on interaction record tabs in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Configure the *`sessionTabTitle`* property to identify the fields that can be used in interaction record tab titles. Enter fields in this property as a comma separated string.

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The system evaluates these fields in the order that they appear in the string. The first field that has a value is used as the interaction record tab title. If none of the fields in the string have values, the system displays the record number as the tab title.

Note: Configured fields must appear on the interaction record.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences** and select CRM Workspace.
2. In the UX Page Properties list, select the *`sessionTabTitle`* property.
3. In the **Value** field, enter the fields to use in interaction record tab titles.
   Enter the fields as a comma separated string. The default string is *`contact,consumer,number`*.

   Note: Configured fields must appear on the interaction record.

4. Select **Update**.

View unread email counters on interaction tabs

Unread email counters display on email interaction tabs in CRM Workspace to help agents track new email activity across multiple interactions.

Before you begin

Role required: admin

About this task

Unread email counters help agents manage multiple email interactions efficiently by providing visual notification of new activity without requiring agents to switch between tabs. This enables agents to prioritize responses and maintain context while working on the current interaction.

When new emails arrive for an email interaction in an inactive tab, a counter increments on the tab. The counter clears when you select the tab. Hover over the tab to preview the latest email without switching to that interaction.

Example: You have multiple email interactions open in tabs. A customer replies to an interaction in an inactive tab. The tab displays an unread counter, such as (2), indicating new activity without requiring you to switch tabs. Complete the following configuration steps to enable unread email counters on interaction tabs.

Complete the following configuration steps to enable unread email counters on interaction tabs.

Procedure

1. Verify email receiving is enabled.

   a. Navigate to **All** > **Email Properties**.

   b. Confirm that the **Email receiving enabled** check box is selected.
      If the check box is not selected, select it and select **Save**.

2. Verify email system status.

   a. Navigate to **All** > **System Mailboxes** > **Administrators** > **Email Diagnostics**.

   b. Verify that email sending and receiving statistics show operational status.

   c. Verify that the connection status displays a green check mark.

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3. Configure the email address for receiving emails.

   a. Navigate to **All** > **System Properties** > **sys_properties.LIST**.

   b. In the **Search** field, enter `sn_eaai_csm.email_addresses`.

   c. In the **Value** field, verify that an email address is specified.
   If the field is empty, enter the email address where you want to receive emails.

   d. Select **Update**.

4. Configure presence states for email channels.

   a. Navigate to **All** > **Advanced Work Assignment** > **Presence States**.

   b. Select **Available**.

   c. In the **Available** block, select **Chat - Asynchronous** and **Email**.

   d. Move the selected options to the **Selected** block.

   e. Select **Update**.

Result

Email interactions appear under the **Ongoing** icon in the left navigation pane below the **Inbox**.

When configured agents receive new emails for interactions open in inactive tabs, an unread counter displays on the tab. Selecting the tab clears the counter and displays the interaction with the new email messages.

Related topics

Email Interaction record page

Configure tabs in the contextual side panel

The contextual side panel in CRM Workspace includes different tools that agents can use to research and resolve customer issues. You can add, rearrange, or hide tabs as well as set default values.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

The panel can be configured to ensure your agents have access to the necessary information for efficient case resolution.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the CRM Workspace experience.
3. Select the desired record page to open the page in the editor view.
4. Select **Tab sidebar** in the Content pane.
   You can also select the component within the editor.
5. To add a tab, select **+Add** in the Tab sidebar component.
6. Select the option for building a tab.

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-
- Use a repeater
- Display lists for a related record
- Add a page collection

This procedure uses the **Start from an empty container** option.

7. Fill out the Tab Settings modal and select **Create**.
   The tab appears at the bottom of the list of tabs.
8. **Optional:** If desired, drag and drop the tab to the desired location in the list.
9. Select **Save** to save the changes to the record page.

Hide tabs in the contextual side panel

Use the **inlineTabExclusion** UX page property to prevent tabs from appearing in the configurable side panel in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

You can configure the **inlineTabExclusion** UX page property for specific tables. The following example shows the default value for this property.

```
[{
  "template": [
    "incident","sn_customerservice_case"
  ],
  "attachment": [
    "sn_customerservice_case"
  ]
}]
```

In the mapping for this property, the key represents the tab to be hidden and the value includes the list of tables for which the tab is hidden. In the above example:

- The Response template tab is hidden for the Incident [incident] and Case [sn_customerservice_case] tables.
- The Attachment tab is hidden for the Case [sn_customerservice_case] table.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select the CRM Workspace experience.
3. In the UX Page Properties related list, select **inlineTabExclusion**.
4. Make the necessary changes to the **Value** field.
5. Select **Update**.

Configure the Agent Assist and Response Template tabs

Add a table configuration for the Agent Assist tab or Response Template tab for custom tables or custom case types in the contextual side panel in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

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About this task

The Agent Assist tab and the Response Template tab that appear in the contextual side panel use a UX page property that contains table configurations. To display these tabs for custom tables or case types, create a new UX page property called **contextualTableConfigMapping** and add the table configurations to that property.

The mapping for this property includes the tab name, the table name, and the sys_id of the table configuration. For example:

```
[{“tab_name”:[{“table=custom_table_name”:”the sys id of the
 table config”}]},
{“tab_name”:[{“table=custom_table_name”:”the sys id of table
 config”}]}]
```

```
[{“agent_assist”:[{“table=incident":"e15061a4b30303002bf182c136a
8dc34"}]},["response_template":[{“table=template”:”0a73bc83c3041
300e2fd5cb981d3ae29”}]}]
```

You can map multiple tables in this property. For example:

```
[{"agent_assist":[{"table=custom_table_name":"the sys id of
 table config"}, {"table=custom_table_name_2":"the sys id of
 table config"}]}]
```

You can also use operators to match multiple tables in the property configuration. The operators in the following example include:

- STARTSWITH
- ENDSWITH
- LIKE: This operator is used to match table names with a pattern. In the following example, the LIKE operator would match with all tables that include the word "case".
- IN: This operator enables you to set a list of values that must match values in your tables.

```
[
  {
    "agent_assist": [
      {
        "tableSTARTSWITHkb_template":
 "5cb4030e73e2330021741c86fbf6a7e1"
      },
      {
        "tableENDSWITHu_kb_template":
 "5cb4030e73e2330021741c86fbf6a7e1"
      }
    ],
    "response_template": [
      {
        "tableLIKEcase": "5f0a5f7e77840010ec75945caa1061a5"
      },
      {
        "tableINagent_file, sn_customerservice_case":
 "82d52b55a300021033d6441d041e61bd"
      }
    ]
```

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```
  }
]
```

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select the CRM Workspace experience.
3. In the UX Page Properties related list, select **New**.
4. Fill in the following fields on the UX Page Property form.

Field	Description
Page	CRM Workspace
Name	Use this name for the property: **contextualTableConfigMapping**
Type	json

Value	Include an entry for Agent Assist or for Response Template or both.
	
	Agent Assist example:
	`[{"agent_assist":[{"table=custom_table_name":"the sys id of table config"}]}]`
	
	Response Template example:
	`[{"response_template":[{"table=custom_table_name":"the sys id of table config"}]}]`
	
	Agent Assist and Response Template example:
	`[{"agent_assist":[{"table=custom_table_name":"the sys id of table config"}]},{"response_template":[{"table=custom_table_name":"the sys id of table config"}]}]`

5. Select **Save**.
   After adding the property, you can open the record page that uses the configured table and test the results in the contextual side panel.

Related topics

Configuring contextual search

Filter activities in the activity stream

Use tags to filter the items that appear in the activity stream in CRM Workspace.

Tags enable you to filter your activities in the activity stream by dynamic and static states not offered in filter lists. For example, these states can include Workaround or Status checked.

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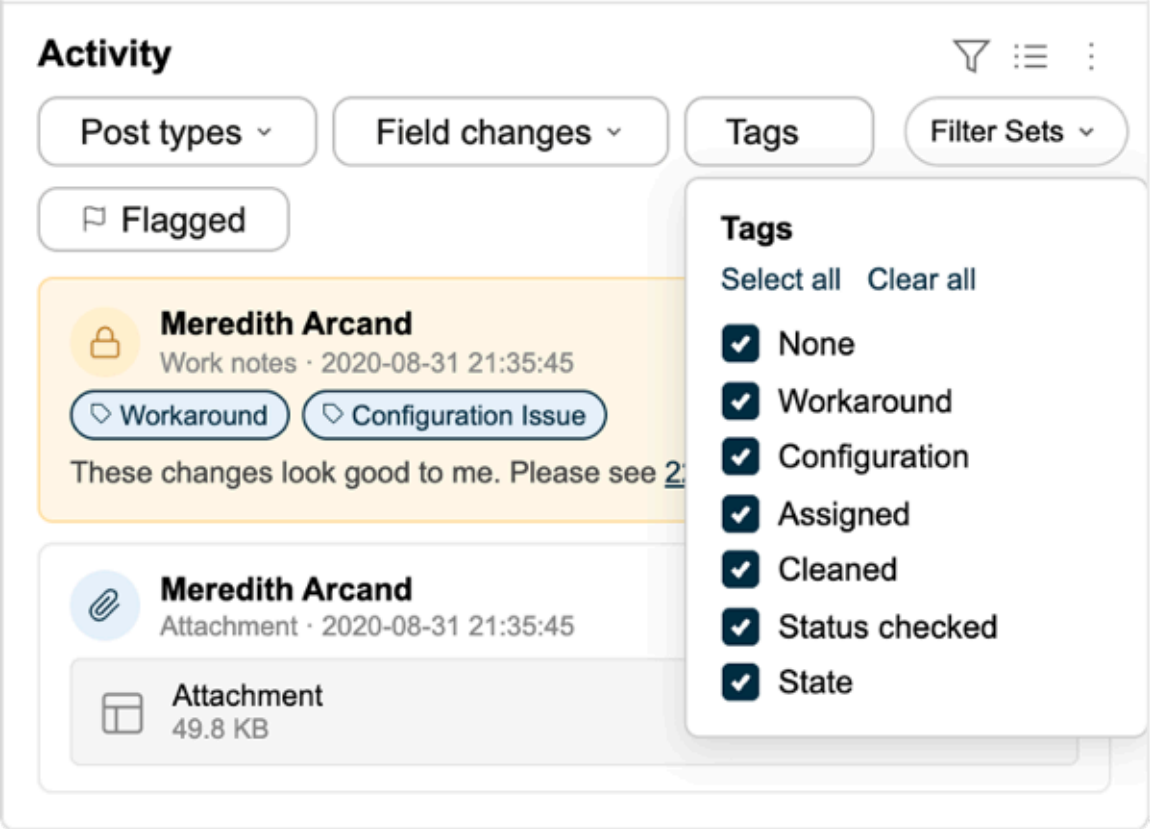

Tags are enabled and created by your system administrator. To enable and add tags for agents as a system administrator, see Create tags for the activity stream.

To use tags to filter activities in the activity stream, see Filter activities with tags.

Configure activity stream tile colors

Administrators can control how activity tile colors display in the activity stream in CRM Workspace for both collapsed and expanded views.

Before you begin

- Role required: admin
- A tile color must be configured using the *`Workspace activity stream background`* attribute. The *`Workspace activity stream apply variant`* attribute only controls where that color is applied (border only, or border and background).

About this task

You can control whether the activity stream tile color appears on the border only or on both the border and background. By default, collapsed tiles show color on the border only, while the expanded tiles show color on both border and background.

Procedure

1. Navigate to **All** > **System Definition** > **Dictionary**.
2. In the **Table** field, filter for the task table.
3. In the **Column name** field, open either *`work_notes`* or *`comments`*.

   Note: These fields must be of type Journal Input for the attribute to work correctly.

4. In the Attributes related list, select **New**.

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5. Enter the following attribute information:
   - **Attribute name**: *`Workspace activity stream apply variant`*
   - **Value**: Select one of the following options:

Activity stream color display options

Option	Description
BORDER_ONLY	Applies variant colors only to the border of the tile in both collapsed and expanded views.
BORDER_AND_BACKGROUND	Applies variant colors to both the border and background of the tile in both collapsed and expanded views.

6. Select **Submit**.
7. Refresh the activity stream to view the changes.

Auto-dismiss alerts in CRM Workspace

In CRM Workspace, alerts automatically dismiss after a set time to reduce alert fatigue and help agents stay focused. By default, Info, Low, and Moderate alerts dismiss after 5 seconds, while Critical and High alerts remain persistent until manually dismissed. Admins can customize the auto-dismiss behavior and timer duration for each alert level.

Admins can configure auto-dismiss alert behavior at the experience level either using UI Builder or UX Page Properties. This configuration provides control over timer duration and display options. Agents view alerts based on the configuration created by the admin.

Role required: admin

You can either configure this feature using UI Builder or UX Page Properties, depending on your preference.

Configuring using UI Builder:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the CRM Workspace experience.
3. In the top-right corner, select **View experience settings**.
4. Scroll to the Configurable alerts section.
5. For each alert level, modify the **Auto-dismiss** check box as needed. Info, Low, and Moderate alerts are enabled by default.
6. In the **Timeout (seconds)** column, enter the duration for which the alert should remain visible. The default is 5 seconds.
7. Configure the following display options.
   - **Show time label**: Shows a countdown timer on the alert. This option is enabled by default.
   - **Expand alert content by default**: Automatically expands the alert content when it appears.
8. Select **Save**.

Configuring using UX Page Properties:

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1. Navigate to the UX Page Properties list by entering `sys_ux_page_property.list` in the application navigator.
2. In the Name column, search for the alert_auto_dismiss_config property.
3. Select the property name to open the UX page property form.
4. In the **Value** field, define the alert levels you want to configure. For example, add the following information to configure an info alert.

Configure an info alert

Option	Description
info	Identifies the alert level as an informational alert. Other levels include: ○ Critical ○ High ○ Moderate ○ Warning ○ Low
enabled	Turns on auto-dismiss for the alert level. Set to true.
timeout	The duration for which the alert remains visible. The default value is 5 seconds. Info, Low, and Moderate alerts are enabled by default.
showTimer	Shows a visible countdown before the alert disappears. Set to true.

5. Select **Save**.

Customize a record page

To customize a record page, you first create a variant, or copy, of the page and then make changes to the variant.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the CRM Workspace experience.
3. Select the desired page in the **Page** list.
   For example, select **Record page**.
4. Select the desired default record page from the Variants list.
   For example, select CSM default record page.
5. Select the additional actions menu for this page and then select **Duplicate** to create a copy of the page variant.
6. Rename the copy of the page variant.

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a. Select the copy of the page variant in the Variants list.

b. Select the additional actions menu for this page and then select **Edit page variant settings**.

c. Enter a new name in the **Variant name** field.

d. Select **Save**

7. Now you can customize the page variant.
   For more information, see the following UI Builder topics:
   - Work with pages
   - Work with components
   - Layouts in UI Builder
8. To delete a page variant:

   a. Locate the page variant to be deleted in the **Pages and variants** list.

   b. Select the additional actions menu for this page variant and then select **Delete variant**.

   c. On the confirmation dialog, select **Delete**.
   The system removes the page variant from the **Pages and variants** list.

Configure the Front-line case page action bar

Configure the action bar on the Front-line case page to include actions from other plugins.

Before you begin

Role required: admin

About this task

The Front-line case page supports actions from the following Customer Service Management and CRM Workspace plugins:

- Case Management Core (com.sn_customerservice)
- CRM Workspace Core (com.snc.agent_workspace.csm)
- CRM Workspace (com.snc.uib.csm_agent_workspace)
- CRM Workspace Foundation (com.snc.uib.cwf_workspace)
- Major Issue Management (com.sn_majorissue_mgt)
- Customer Service with Service Management (com.sn_cs_sm)
- Customer Service with Request Management plugin (com.sn_cs_sm_request)
- Time Recording for Customer Service (com.snc.csm_time_recording)
- Omni-Experience Standard Feature Set

If you are using any additional plugins, use the steps in this task to add the actions from those plugins to the Front-line case page action bar. You can add actions in the following ways:

- Add actions to an existing layout group (step 2).
- Create a layout group and add actions to that group (steps 3 and 4).
- Add actions directly to the action bar (step 5).

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Procedure

1. Verify that the UI action or declarative action has a corresponding record in the UX Form Actions table (sys_ux_form_action).
   a. Enter **sys_ux_form_action.list** in the application navigator and press Enter.
   b. Search for the desired form action in the UX Form Actions list.
   c. Create a form action record if it does not exist.
2. **Optional:** Add the action to an existing layout group.
   You can create a layout group and add the action to that group (see step 3). By default, the Front-line case page supports three groups: Compose, Create, and Manage.
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layout Groups** and select a group.
   b. Select the lock icon next to the **Actions** field, add the desired action from the Available UX Form Actions list, and select **Save**.
3. **Optional:** Create a layout group.
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layout Groups** and select **New**.
   b. Enter a name for the layout group in the **Name** field.
   c. Select the lock icon next to the **Actions** field, add the desired action from the Available UX Form Actions list, and select **Save**.
   Because this is a new group, you need to add it to the Front-line case page layout (see step 4).
4. If you created a new layout group in step 3, add the group to the Front-line case page layout.
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layouts**.
   b. Select the Front-line Case Actions layout.
   c. Select **New** in the UX Form Action Layout Items related list.
   d. On the new record page, set **Item Type** to Group and set **Group** to the group created in step 3.
   e. Fill in the rest of the fields on the form and select **Save**.
5. **Optional:** To add an action directly on the action bar:
   a. Navigate to **All** > **Declarative Actions** > **Form Action Layouts**.
   b. Select the Front-line Case Actions layout.
   c. Select **New** in the UX Form Action Layout Items related list.
   d. On the new record page, set **Item Type** to Action and set **Action** to the desired UX Form Action.
   e. Fill in the rest of the fields on the form and select **Save**.

Add the Timeline component as a standalone component

Add the Timeline component as a standalone component to a record page by using the Task activity timeline reset and controller.

Before you begin

Role required: admin

About this task

The Timeline component displays activities for task-based records such as cases or incidents in a timeline view. It uses the resolution shaper configuration to automatically fetch and organize your data.

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To add the Timeline component to a record page as a standalone component, the admin can do the following:

- Select the Task activity timeline controller and preset.
- Complete the component configuration.

Procedure

1. Open a page variant in UI Builder.
2. On the page variant, select the + icon to add a component.
   For example, add a component above the lookup card in the left column.
3. Select the Timeline component from the Add content pop-up window and then select **Add**.
4. Select the Task activity timeline preset from the Select a preset pop-up window and then select **Apply**.
   This also adds the Task activity timeline controller 1 to the page.
5. Select **Use preset**.
6. Select **Task activity timeline controller preset** and then select **Apply**.
   This auto populates the necessary properties such as the table and sys ID.
7. In the Configure tab, select a role in the **Fulfiller Role** field.
8. Close the controller dialog box and select **Save** to save the changes to the page variant.

Enable the Timeline component to refresh

Enable the Timeline component to refresh when a record has new activities.

Before you begin

Role required: admin

Procedure

1. Open a page variant in UI Builder.
2. Select **Record Watcher 1** in the Data and scripts section in the left column.
   This opens the Record Watcher 1 pop-up window.
3. Select the Events tab.
4. In the Message received section, select **Add handler**.
5. In the **Choose a handler** field, select **Refresh Task Activity Timeline**.
6. Select **Continue** and then select **Add**.
7. Close the Record Watcher 1 pop-up window.

Configure the activity timer log

Configure the activity timer log to appear on selected record pages in CRM Workspace.

Before you begin

Role required: admin

About this task

The activity timer log feature automatically tracks the time that agents spend working on cases and interactions and provides detailed time reports. This feature is available on the following record pages:

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- CSM default record page
- Front-line case page
- CSM Interaction record page
- Email interaction record page
- CSM voice interaction record page
- CSM centered chat interaction record page

Procedure

1. Install the Activity Timer Reporting application (sn_activity_timer_reporting).
   The Activity Timer Reporting application has a dependency on the Activity Timer application.
2. Assign the sn_at.admin role to the appropriate users.
3. Assign the sn_at.agent role to the appropriate users.
4. Configure the following UI Builder page properties.

Activity timer log page properties

Property	Description
activity_timer	Enables the activity timer component in the workspace. ○ True: Activity timer is active. ○ False: Activity timer is inactive.
activity_timer_custom_tables	Specifies custom tables for the activity timer log feature.
activity_timer_case_type_exclusion	Specifies case types excluded from the activity timer log feature.

Related topics

Activity timer log

Recommended Actions tab not appearing on the CSM default record page

The Recommended Actions (RA) tab may not appear in the contextual side panel of the CSM default record page or the CSM Interaction record page. The cause determines the resolution.

Before you begin

Role required: admin

About this task

The Recommended Actions tab may not appear in the contextual side panel for one of the following reasons:

- **The Recommended Actions page variant is inactive.** The record page may use a customized variant created before RA was introduced as a static tab. This can occur after an upgrade, even if RA was visible before.
- **The record is from a table that extends the Case table.** The Hide tab condition on the RA tab in the Tab sidebar component matches the base system Case [sn_customerservice_case] table name exactly, so the condition evaluates as true and the tab is hidden. Contexts, rules, and recommendations can still be created for any table. Only the visibility of the RA tab on the CSM default record page is affected.

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The following procedure applies only when the Recommended Actions page variant is inactive.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. On the Experiences tab, select CRM Workspace.
3. On the CRM Workspace page, scroll to the Records section and select one of the supported record pages:
   - CSM default record page
   - CSM Interaction record page
4. In the content tree on the left, select **Tab Sidebar**.
5. In the right panel, locate the Page Collection for the CSM default record mid-tabs and select the **Sub-pages & pages** icon beside it.
6. In the Page collection controller dialog, select the **Lookup window** icon beside the Recommended Actions default option.
7. On the Page Collection window, select **Settings** at the top.
8. On the Variant: Recommended Actions for CSM Default Record Page, under Availability, enable the **Active** check box.

> **Note:** If RA still does not appear after completing this procedure, the record page variant may have been created before RA was introduced as a static tab. Static tabs added in newer releases aren't automatically included in existing customized variants during an upgrade. In this case, manually add RA as a static tab to the affected variant.

Configure record pages to hide Customer Central components

Configure the CSM default record page and CSM Interaction record page to hide the Customer Activity and Customer Information tab components.

Before you begin

Role required: admin

About this task

Starting with the Yokohama release, CRM Workspace has a dependency on the Customer Central plugin. The Customer Central application is installed automatically with CRM Workspace.

The Customer Central installation can result in the Customer Activity and Customer Information tab components appearing on the following CRM Workspace record pages:

- CSM default record page
- CSM Interaction record page

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the Page collections tab.
3. Select a page collection.
   - CSM default record post-Details
   - CSM Interaction record post-Details
4. Select **Settings** for one of the following page variants to open the settings panel.

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- Customer Activity default
- Customer Information default

5. In the Availability section, disable the **Active** check box.
6. Select **Save**.

Set up additional CRM Workspace features

You can set up additional features for use in CRM Workspace. These features typically require plugin activation and some configuration.

You can set up the following features for use in CRM Workspace.

CRM Workspace additional features

Feature	Description
Customer Central	Customer Central provides customer service agents with all the information about the customer in one central place. • The Customer Information view displays key information about the customer. • The Customer History view displays recent customer touch points in an activity feed. Use Customer Service guided setup to Configure Customer Central.
Customer Service Case Types	Configure case types to handle different types of customer issues. A case type identifies the processes and the data needed to resolve a specific type of issue, such as a lost or missing credit card. Use Customer Service guided setup to Configure customer service case types.
Proactive Customer Service Operations	Use this feature to track the digital services used by your customers and to proactively create cases for service disruptions. Use Customer Service guided setup to Configure Proactive Customer Service Operations.
Playbooks for Customer Service Management	Playbooks provide step-by-step guidance for completing the tasks needed to resolve specific types of customer service cases. The following playbooks are available for Customer Service Management from the ServiceNow Store: • Case Playbook for Onboarding • Case Playbook for Complaints • Case Playbook for Product Support

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CRM Workspace additional features (continued)

Feature	Description
Guided decisions	Resolve complex cases faster and more efficiently by guiding customer service agents through a structured troubleshooting process. For details, see Configuring Guided Decisions.
Lookup and verify	This feature enables customer service agents to quickly look up contacts or consumers using information such as the name, phone number, or record number.
Estimated time to resolve a case	Use machine learning to predict the estimated time to resolve a case (ETTR) based on case attributes such as the short description, category, priority, and assignment group. For details, see Configure estimated time to resolve a case.

Migrating to CRM Workspace

If you are currently using CSM Agent Workspace, you can implement CRM Workspace and continue using some of your existing CSM Agent Workspace configurations.

Some configurations can be used by both CSM workspaces while others need to be configured specifically for CRM Workspace. Of these configurations that are specific to CRM Workspace, some are accomplished in the platform interface using lists and forms, while others are accomplished using the UI Builder.

Use the topics in the following table to explore CRM Workspace features. Then follow the steps to implement CRM Workspace and migrate your existing CSM Agent Workspace configurations.

Explore

- Explore CRM Workspace
- Workspaces in Customer Service Management

Migrate

1. Set up CRM Workspace
2. Migrate to CRM Workspace

Explore CRM Workspace

CRM Workspace is a workspace that can easily be configured and extended using UI Builder.

UI Builder is a drag-and-drop web user interface builder that you can use to build and configure CRM Workspace pages and components.

UI Builder

Working in UI Builder enables you to preview the final interface of the workspace you're building and to see the effects of different configurations. For CRM Workspace, some configurations are also performed in lists and forms.

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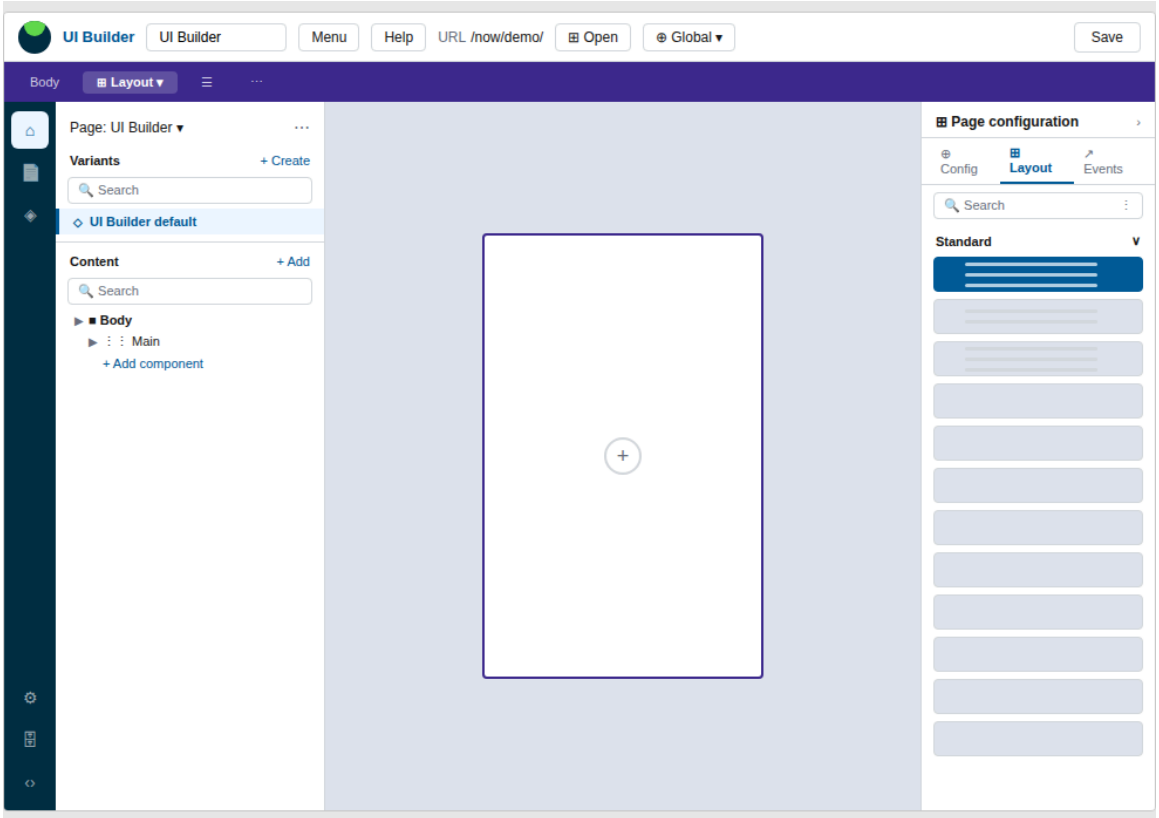
UI Builder



Working in UI Builder

A page in a workspace is made up of components that enable your users to accomplish one or more tasks. For example, you can create a page to solve employee software issues at your company.

You build out the functionality within the page by adding the components that you need for your user experience. Components are elements like buttons and data visualizations. UI Builder comes with a library of components you can add to the page.

After the components are on your page, you can change the layout any way you want. For example, you can use themes to make a page match your company's styles and standards. For more information, see Manage the visual style of UI Builder experiences.

Add an event mapping to a component. Event mapping is an important process within UI Builder. When you build pages with components, you need those pages to actually perform actions for users. For example, you can map a button to an event handler to perform a button action when a user selects that button. Another example may be adding a data resource such as a form. You could set up an event handler to notify a user when the page succeeds in loading the form.

UI Builder is as powerful as you need it. You can build simple web experiences, or you can create complex data-driven experiences.

Setting up CRM Workspace

For more information about configuring different features in CRM Workspace, such as ribbon configurations, form headers, and UI actions, see Set up CRM Workspace.

Related topics

UI Builder

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Migrate to CRM Workspace

Follow the instructions in this topic to migrate from CSM Agent Workspace to CRM Workspace.

If you are currently using CSM Agent Workspace and want to migrate to CRM Workspace, you can continue using most of your existing configurations. Some features, however, need to be configured specifically for CRM Workspace. You can migrate some of the configurations using lists and forms and others using the UI Builder tool.

Workspace configuration examples

Workspace configurations	Examples
Configurations that work in both CSM Agent Workspace and CRM Workspace without modification.	• Ribbons • Forms
Configurations that are different for CRM Workspace.	• Lists • List categories

Also, be aware that some configuration changes made for one workspace can also affect the other. For example, changes to the CSM Agent Workspace configuration may impact CRM Workspace. The same applies to changes to the CRM Workspace configuration, which may impact CSM Agent Workspace.

Note: For customers who are **not** currently using CSM Agent Workspace and want to implement CRM Workspace, use the CRM Workspace guided setup by navigating to **Customer Service** > **Administration** > **Guided Setup** > **CSM Configurable Workspace**. Clicking **Configure** in this category takes you to the Configurable Workspace guided setup. The information and instructions in the different guided setup categories can help you set up a new implementation of CRM Workspace.

Workspace features

This section provides information, parameters, and steps to complete the migration of CSM Agent Workspace configurations to CRM Workspace. Select the feature that you want to migrate from the following list.

Workspace features and descriptions

Feature	Description
Activity stream	Activity Stream enables agents to communicate with requesters and make internal notes about the work done on a record.
Agent assist	Agent assist provides agents with automatic search results that show possible solutions for records they open.
Agent Chat for CRM Workspace	Agent Chat enables agents to interact with customers, create incident or case records, or transfer chats to another agent or queue.

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Workspace features and descriptions (continued)

Feature	Description
Branding and theming	Branding and theming enables you to customize your Configurable Workspace to your company branding and theming.
Email Composer and Email Viewer	The Email Composer enables requestors and fulfillers to use email to communicate.
Customer Central	Customer Central displays all the touch points that a customer has had with a contact center in the form of information cards.
Declarative actions	Declarative actions add custom functionality to your Workspace forms, fields, lists, and related lists without writing custom scripts or learning APIs.
Forms	The form is the user interface where agents do most of their work.
Form headers	Form headers provide an overview of the record.
Global Search in configurable workspaces	Global Search provides users with the ability to search for information within the defined search sources.
Highlights	Highlights provide background color that visually expresses the status of a highlighted value.
Lists	The list view displays filtered lists of records, such as All tasks, Open tasks, and My tasks.
Ribbons	Ribbons help agents quickly scan relevant information about a record, such as a timeline, a user, or a customer summary.
UI Action Bar	UI actions include custom buttons, menu items, and limiting access to forms based on user role.

Activity stream

Learn about how the Workspace Activity stream functions in Configurable Workspace.

Activity stream enables agents to communicate with requesters and make internal notes about the work done on a record. Configure the Activity stream and Activity stream Compose components in UI Builder to set up Activity stream in Configurable Workspace.

For more information about the Activity Stream component, see the Next Experience Components documentation and select Activity Stream from the list of Next Experience Components.

Activity Stream corresponding parameters

Workspace Activity stream matched with Configurable Workspace parameters.

Note: Not every Configurable Workspace component parameter has a corresponding Workspace (legacy) parameter.

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Activity stream and corresponding parameters

Component	Legacy component name	Legacy component parameter name	UIB component parameter name
Activity Stream	now-activity-stream-connected	table	table
		sysID	sysID
		isNewRecord	isNewRecord
			title
			view
			showConversationFilter
			showTileAvatars
			showTileIcons
			events
			supplemental
			ambChannels
			filterOptions
			timestamp
Activity Stream compose	now-activity-stream-compose-connected	table	table
		sysID	sysID
		isNewRecord	isNewRecord
		fields	Fields
			title
			useTabs

Agent assist

Learn about how the Workspace Agent assist functions with Configurable Workspace.

Agent assist provides agents with automatic search results that show possible solutions for records they open. Configure Agent assist in Configurable Workspace by configuring a record page with a Glide form data source and a Contextual Sidebar. For more information, see Agent assist Overview on the ServiceNow Developer Site.

Note: You may need to log in to the Developer Site to see the content.

For more information about using contextual search for Agent Assist, see Contextual search.

Agent Chat for CRM Workspace

Learn how the CSM Agent Workspace Agent Chat functions with CRM Workspace.

Agent Chat enables agents to interact with customers, create incident or case records, or transfer chats to another agent or queue. CSM Agent Workspace Agent Chat configurations work with CRM Workspace.

For more information about the Agent Chat component, see Next Experience Components documentation and select Agent Chat from the list of Next Experience Components.

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Agent Chat corresponding parameters

Parameters that are hidden in UI Builder (UIB) aren't configurable in UIB. These parameters are used for specific customer workflow use cases.

Component parameters for Agent Chat

Component	Legacy component name	Legacy component parameter name	UIB component parameter name
Agent Chat	sn-chat	Interaction - Active	• Interaction Sys ID - Active (Hidden in UIB) • User isUxf (Hidden in UIB)

Branding and theming

Learn about branding and theming for your Configurable Workspace.

Branding and theming enables you to customize your Configurable Workspace to your company branding and theming. Configure your Configurable Workspace branding and theming in UI Builder to brand and theme your Configurable Workspace.

For more information about branding and theming, see the following topics:

- View the brand and theme setting in your workspace experience
- Configuring Next Experience with Theme Builder
- Configuring Next Experience themes and preferences

Email Composer and Email Viewer

Learn about how the Email Composer and Email Viewer function with Configurable Workspace.

Email Composer

The Email Composer component enables requestors and fulfillers to use email to communicate. The component is associated with a record to include conversations as part of the record. For example, an agent can compose an email to a customer to gather information about the customer's case.

Email Composer corresponding tables

Legacy table name	UIB table name
No corresponding table	sys_ux_screen

Configure the Email Composer in UI Builder.

For more information about the Email Composer component, see Next Experience Components documentation.

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Email Viewer

The Email Viewer component enables customer service agents to preview emails in CRM Workspace before sending them to customers. The component is associated with a record to include emails as part of the record.

Email Viewer corresponding tables

Legacy table name	UIB table name
No corresponding table	sys_ux_screen

Configure the Email Viewer in UI Builder.

For more information about the Email Viewer component, see Next Experience Components documentation.

Customer Central

Learn about how CSM Agent Workspace Customer Central functions with CRM Workspace.

Customer Central displays all the touch points that a customer has had with a contact center in the form of information cards. CSM Agent Workspace Customer Central configurations function in CRM Workspace.

Configuration changes at the sn_customercentral_cust_info_config and sys_declarative_action_assignment and their related lists, however, can be configured in CRM Workspace.

- Set up the Customer Information view in CRM Workspace using Guided Setup.
- Set up the Customer Information view in CSM Agent Workspace using Guided Setup.

Customer Central corresponding tables

Legacy table name	UIB table name
sys_declarative_action_assignment	sys_ux_screen

Declarative actions

Learn how the Workspace declarative actions function with CRM Workspace.

Declarative actions add custom functionality to your CRM Workspace forms, fields, lists, and related lists without writing custom scripts or learning APIs. Declarative actions include: form and list actions, related list actions, and field decorators.

Declarative actions corresponding tables

Legacy table name	UIB table name
Action Assignment [sys_declarative_action_assignment]	Action Assignment [sys_declarative_action_assignment] UX Add-on Event Mapping [sys_ux_addon_event_mapping]

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To migrate a declarative action, convert your custom declarative actions to new UXF Client Action type, and then define the corresponding add-on event mapping. For more information, see the following topics:

- Customizing your workspace with declarative actions
- Declarative actions glossary

Related topics

Manage actions in UI Builder pages

Bind an event to a declarative action

Forms

Learn how the Workspace form functions with CRM Workspace.

The form is the user interface where agents do most of their work. Workspace form configurations work without modification in CRM Workspace, but the configurations may affect the functioning of your CRM Workspace.

Form parameters

Form mapping doesn't directly correspond between workspace form components and CRM Workspace form components. Workspace components are hard-coded with the form and incorporate everything on the form including the form header, UI action bar, Activity stream, the sidebar, etc. In CRM Workspace, these features are separate components.

Form headers

Learn how workspace form headers function with CRM Workspace.

Form headers provide an overview of the record.

Form header corresponding tables

Legacy table name	UIB table name
sys_aw_form_header	sys_aw_form_header sys_ux_header_config sys_ux_m2m_workspace_header_ux_header_config

To migrate your workspace form header to CRM Workspace, add an additional step in custom form headers to the CRM Workspace form header setup.

- An additional form header configuration is provided out of box, CRM Workspace Header Config.
- Legacy form headers function without modification, but may affect the functionality of CRM Workspace.
- Add the Form header component to your CRM Workspace for additional functionality.

For additional information, see Set up a form header in Configurable Workspace.

Global Search in configurable workspaces

Learn about how the CSM Agent Workspace Global Search functions with CRM Workspace.

Global Search provides users with the ability to search for information within the defined search sources.

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Global Search corresponding tables

Legacy table name	UIB table name
sys_aw_global_search_config	sys_ux_page_property

For more information, see Using AI Search with CRM Workspace.

Highlights

Learn how Workspace highlights function with CRM Workspace.

Highlights provide background color that visually expresses the status of a highlighted value. The status you choose determines the color highlight.

Highlight corresponding tables

Legacy table name	UIB table name
sys_highlighted_value	sys_highlighted_value sys_ux_highlighted_value_config sys_ux_m2m_highlighted_value_config

To migrate your highlights, add an extra step in the custom highlighted values to CRM Workspace.

An additional highlighted value configuration is provided out of box, CRM Workspace Highlighted Value Config.

- Legacy highlighted values in form headers work without modification, but may affect the functionality of CRM Workspace.
- Highlighted values must be added to a highlighted value configuration to appear in CRM Workspace.

For more information, see Set up a highlighted value.

Lists

Learn about how Workspace lists function with CRM Workspace.

The list view displays filtered lists of records, such as All tasks, Open tasks, and My tasks. By setting up list categories and filtered lists, you help your agents quickly find the records they need to work on. Configure your Workspace lists setups in CRM Workspace.

List Menu Configuration

The Menu Configuration is a container that houses the default configurations of the list menu which consists of categories and filters.

List Menu corresponding tables

Legacy table name	UIB table name
No corresponding table	sys_ux_list_menu_config

The List Menu setup is added by default to CRM Workspace. Associate your list and list categories with this configuration.

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List categories

List categories enable you to group records so that agents can find the records they need to work on.

List category corresponding tables

Legacy table name	UIB table name
sys_aw_list_category	sys_ux_list_category

Filtered lists

Filtered lists enable you to group records that help agents do their work more efficiently.

Filtered list corresponding tables

Legacy table name	UIB table name
sys_aw_list	sys_ux_list

Note: Roles and groups are defined in the UIB table and are not applicable.

Role and Access

Roles and access enable you to define the audience of each of the lists defined in the list filters.

Role and Access corresponding tables

Legacy table name	UIB table name
sys_aw_list	sys_ux_applicability_m2m_list

To migrate roles and access, select a filtered list and choose the audience.

Ribbons

Learn how CSM Agent Workspace ribbons function with CRM Workspace.

Ribbons help agents quickly scan relevant information about a record, such as a timeline, a user, or a customer summary.

Ribbon corresponding tables

Legacy table name	UIB table name
sys_aw_ribbon_setting	sys_aw_ribbon_setting sys_ux_ribbon_config sys_ux_ribbon_config_setting

Legacy ribbon widgets work in CRM Workspace, but not the legacy ribbon configurations. Add ribbon settings to a ribbon configuration to appear in CRM Workspace.

For more information, see Set up a ribbon configuration in Configurable Workspace.

UI Action Bar

Learn how the Workspace UI Actions component functions with CRM Workspace.

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UI actions include custom buttons, menu items, and limiting access to forms based on user role. The UI Action Bar component replaces the UI Actions component in Workspace.

UI Action Bar corresponding tables

Legacy table name	UIB table name
sys_ui_action	sys_ux_form_action

To migrate UI actions, each UI action must have a corresponding form action to use UI actions in Configurable Workspace.

For more information, see Set up a form action in Configurable Workspace.

Case routing and assignment

Set up Advanced Work Assignment (AWA) to automatically route cases to the appropriate customer service agents in CRM Workspace.

Setting up Advanced Work Assignment for CRM Workspace

Topic	Description
Exploring Advanced Work Assignment	Learn more about the AWA tool, including concepts such as work assignment and assignment rules, service channels, work items and work item queues, and agent capacity.
AWA for CSM	Use AWA to automatically assign work to your agents based on availability, capacity, and skills. AWA pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. Agents see their assignments in their CRM Workspace inbox.
Set up an AWA service channel for assigning case tasks	Set up an Advanced Work Assignment (AWA) service channel that you can use to assign case tasks to available users.
Configure AWA queues for the proxy contact role	Modify the Advanced Work Assignment queues and add routing conditions that support the proxy contact role. This role enables employees to create cases for customer accounts and contacts. Employees can also be proxy case contacts on behalf of customers.

AWA for CSM

Use the ServiceNow® Advanced Work Assignment (AWA) for Customer Service Management feature to automatically assign work items to agents based on their availability, capacity, and skills. AWA for CSM pushes work to qualified agents using work item queues, routing conditions, and assignment criteria that you define. Agents see their assignments in their CRM Workspace inbox.

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Plugins

The Advanced Work Assignment for CSM feature is available with the Case Management Core plugin (com.sn_customerservice).

To use the shift-based assignment feature for customer service cases, you must enable the following plugins:

- Workforce Optimization for Customer Service (com.snc.wfo.csm)
- Advanced Work Assignment (com.glide.awa)

For more information, see Activate Workforce Optimization for Customer Service.

To use the chat feature with Advanced Work Assignment for CSM, you must also activate the Agent Chat plugin (com.glide.interaction.awa).

For more information, see Activate related plugins for Advanced Work Assignment.

Inbox layouts

Three chat inbox layouts are included with the Chat service channel.

Chat Layouts and fields on the Chat Service channel

Chat Layout	Included Fields
Default Chat Layout	Short description
Contact Chat Layout	Short description, Contact, Account
Consumer Chat Layout	Short description, Consumer

Two case inbox layouts are included with the Case service channel.

Case Layouts and fields on the Case service channel

Case Layout	Included Fields
Default Case Layout	Short description, Contact, Account, Priority, Category
Consumer Case Layout	Short description, Consumer, Priority, Category

Variable work item sizing

Organizations may like to size cases based on the complexity of the case, time and effort required to complete work. This helps in estimating agent utilization accurately. Advance work assignment currently treats every case as one unit of work. However, sometimes, certain cases may require more work than others. These cases may account for a greater share of an agent's capacity. Work item sizing allows to size the case differently based on the case attributes. For more information, see Service channel capacity and utilization.

Agent affinity

Agent Affinity is an Advanced Work Assignment enhancement that enables you to streamline the routing of work items. Advanced Work Assignment automatically assigns work items based

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on historical, task-based, or account team affinity. For more information about agent affinity, see Using Agent Affinity.

Related topics

Advanced Work Assignment

Set up an AWA service channel for assigning case tasks

Set up an Advanced Work Assignment (AWA) service channel that you can use to assign case tasks to available users.

Before you begin

Role required: admin

You can use the Advanced Work Assignment (AWA) feature to automatically assign work items to users based on their availability and capacity.

AWA assigns work items using assignment groups so it's important that your users and groups are set up correctly.

- Determine the assignment group to use in the AWA service channel configuration and add users to this group.
- Add the **Assignment Group** field to the Case Task form view and make the field mandatory.
- Ensure that the users in the assignment group have access to case tasks.

> **Note:** By default, CSM uses assignment groups to control visibility to case tasks. Therefore the logic to assign a case task to the correct assignment group is triggered when a case task is created.

About this task

Setting up a service channel involves multiple steps, which are detailed in the following procedure. Once the service channel setup is complete, you can use AWA to assign newly created case tasks that:

- Are unassigned.
- Satisfy the conditions specified in the service channel.
- Have the configured AWA assignment group selected in the **Assignment Group** field on the Case Task form.

Procedure

1. Create the case task service channel.

   a. Navigate to **Advanced Work Assignment** > **Service Channels** and select **New**.

   b. Fill in the fields on the Service Channel form.

Service channel field descriptions

Field	Description
Name	Name of the service channel that you are configuring. For example, Case Task.
Inbox order	Order in which channel items appear in the user inbox. The **Inbox Order** field is an integer field type. This field can store whole numbers.

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Field	Description
Application	Name of the application. For the Case Task channel, select Customer Service.
Active	Option for activating the service channel. When you select this option, the associated queues for the service channel can start accepting work items.
Short description	Brief description of the service channel.
Table	Table that stores the service channel records. To route case tasks, select the Task (sn_customerservice_task) table.
Assign to field	Field that references the user that the item is assigned to. For the Task table, this field is the **Assigned to** (assigned_to) field.
Assignment group field	Field that references the assignment group that the item is assigned to. For the Task table, this field is the **Assignment group** field.
Advanced condition	If enabled, the advanced conditions that apply to the channel. For case tasks, the parent case is active: **[Active] [is] [true]**.
Default work item size	Amount of a user's capacity that is used if this work item is assigned. The default is 1.
Default capacity	Number of items automatically assigned to agents (pending overrides). The default for this field depends on the type of work item.
Utilization condition	Condition that determines what constitutes an active item that counts toward user workload/capacity. For case tasks: **[State] [is not] [Closed]**.

c. Click **Submit**.
The system adds the Case Task channel to the Service Channels list.

For more information about creating an AWA service channel, see Create a service channel.

2. Configure the layout for the case task inbox card.

a. Select **Case Task** in the Service Channel list to open the record.

b. In the Inbox Layout related list, select **Default Case Task layout**.

c. Add the following fields to the card layout.

- **Field 1**: Number
- **Field 2**: Subject
- **Field 3**: Parent Number

d. Select **Update**.

For more information about configuring the card layout, see Create or modify an inbox layout.

3. Create a queue for the case task service channel.

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a. In the Queue related list, select **New**.

b. Fill in the following fields on the Queue form.

Queue related list field description

Field	Description
Name	Name of the queue. For example, Case Task Assignment.
Short description	Brief explanation of the queue. For example, Assign case tasks to middle office users.

c. Select **Submit**.

For more information about configuring a queue, see Create a work item queue.

4. Create an assignment rule for the Case Task Assignment queue.

a. Navigate to **Advanced Work Assignment** > **Assignment Rules** and click **New**.

b. Fill in the fields on the Assignment Rule form.

Assignment rules field descriptions

Field	Description
Name	Name of the assignment rule.
Short description	Brief description of the assignment rule. For example, Assign the case tasks based off this configuration.
Assign by	Type of assignment. Select **Most Capacity**, which routes a work item to the user who has the greatest availability for handling the work.
Allow agents to reject	In the Rejection handling form section, enable this check box to enable users to reject work items in their inbox.

c. Click **Submit**.

For more information about creating an assignment rule, see Configure agent assignment rules.

5. Create a group for the Case Task Assignment queue.

a. Navigate to **Advanced Work Assignment** > **Management** > **Groups** and select **New**.

b. Fill in the fields on the Group form and select **Submit**.

c. Select the group to display the Group form.

d. In the Group Members related list, add users to the group.

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The users that you add to the group for the Case Task Assignment queue require the following roles:

- Case task agent (sn_customerservice.case_task_agent)
- AWA agent (awa_agent)

For more information about creating a group, see Create or modify groups for Advanced Work Assignment queues

6. Associate the assignment rule with the Case Task Assignment queue.
   a. Navigate to **Advanced Work Assignment** > **Settings** > **Queues** and select the Case Task Assignment queue.
   b. In the Assignment Eligibility related list on the Queue form, select **New**.
   c. Select the case task assignment rule in the **Agent assignment rule** field.
   d. Select the case task assignment group in the **Groups** field.
   e. Select **Submit**.
7. Activate the service channel.
   a. Navigate to **Advanced Work Assignment** > **Settings** > **Presence States**.
   b. Select the **Available** presence state and add the case task service channel to the **Selected** column.
   c. Select **Update**.
   Once the service channel is activated, you can use it to assign work items. For more information, see Service channels.

Configure AWA queues for the proxy contact role

Modify the Advanced Work Assignment queues and add routing conditions that support the proxy contact role and the **Internal contact** field on the Case form.

Before you begin

Role required: admin

About this task

Modify the following AWA queues:

- For the Case service channel: Customer Service Cases
- For the Chat service channel: Customer Service

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Queues**.
2. Select the **Customer Service Cases** queue.
3. In the **Work item routing condition** field, add the following OR condition: **Internal Contact is not empty**.
4. Select **Update**.
5. Select the **Customer Service** queue.
6. In the **Work item routing condition** field, add the following OR condition: **Roles is sn_csm_proxy_cont**.
7. Select **Update**.

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Agent tools

Enable agents to resolve cases quickly and efficiently by providing them with tools, such as Guided Decisions, playbooks, dynamic related records, and Customer Central.

Setting up agent tools

Tool	Description
Guided Decisions	Set up structured troubleshooting processes to help agents resolve complex issues in a consistent way.
Playbooks	Set up playbooks to provide agents with step-by-step guidance for resolving specific types of customer service cases, including onboarding, complaint, and product support cases.
Dynamic related records	Configure the dynamic related records feature to display related records in the contextual side panel in CRM Workspace. These records dynamically change based on the context of the current record or playbook activity.
Customer Central	Configure the Customer Information and Customer History views in Customer Central to provide agents with all the information about a customer in one central place.
Customer Service mobile application	Configure and customize the Customer Service mobile application for agents who use the application instance on their mobile devices.

Configuring Guided Decisions

Create structured troubleshooting processes for your agents through the ServiceNow® Guided Decisions Experience application. Help your agents solve complex issues in a consistent way.

Note: The Guided Decisions Experience[com.snc.guided_decisions_playbook_experience] plugin is planned for deprecation in the Denmark release. Existing customers who already have the plugin installed can continue to access and migrate their Guided Decision Trees to Guided Decision Playbooks. However, new customers, or customers who have not previously installed the Guided Decisions Experience plugin, must create new decision flows using Guided Decision Playbooks, as Guided Decisions is no longer available for new installations. For migration guidance, see the Guided Decisions Experience Deprecation: Migrating Guided Decision Trees to Guided Decision Playbooks KB article.

The Guided Decisions Experience application is a tool for authoring and running decision tree flows. A decision tree walks an agent through a troubleshooting process based on a record context. The process asks a series of questions and the agent provides the answers. Based on those answers, the agent receives guidance on the next steps to take in the resolution process. Agents can resolve complex issues faster and more efficiently. For more information, see Decision trees in Guided decision.

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Scenarios for using decision trees

Decision trees can help agents resolve the following types of customer issues:

- Troubleshoot a faulty device, such as a laptop that doesn't work. Use a decision tree to find the cause and provide a fix for the customer.
- Review a refund request. Use a decision tree to determine whether the customer is eligible for a refund, which can include checking for exceptions and creating tasks.
- Reset a customer's password. Use a decision tree to walk the agent through the process, such as verifying the customer's identity, trying other options, and, if needed, resetting the password.

For an example of end-to-end configuration of a decision tree for a specific scenario, see Example configuration of a decision tree.

Guided Decisions features

- Reuse values in a decision tree by linking inputs in question and guidance nodes. You can also link inputs of a child tree to a parent tree.
- Link an activated decision tree to your current decision tree to reuse other decision trees and reduce effort in creating new ones. The linked decision tree acts as a child tree to the current decision tree.
- Enable users to edit their responses in the previous question nodes or a guidance node.

  In a nested decision tree, users can navigate back to the previous node of a parent tree from a child tree.

Guided Decisions experiences

The Guided Decisions Experience application provides two different experiences for creating and editing decision trees: through the Decision Tree Builder or the Core UI.

- Create a graphical diagrammatic representation of nodes and their paths in a troubleshooting process through the Decision Tree Builder. For more information, see Decision trees in Decision Tree Builder.
- Use forms and lists and edit existing decision trees through the Core UI. For more information, see Decision trees in Core UI.

Setting up the Guided Decisions Experience application

As an admin, set up the Guided Decisions Experience application to enable users to create and run decision trees by completing the following setup tasks:

- Install the Guided Decisions Experience application.
- Assign roles to Guided Decisions users - Use roles to control access to Guided Decisions features and information.
- Install the Recommended Actions application - Enables decision trees to be run as recommended actions.

Creating and using decision trees

Users with the decision tree author role (decision_tree_author) create decision trees. After creating a decision tree, the decision tree is implemented by adding it to a recommended action, playbook, or Service Portal. For more information, see the following topics:

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- Create a decision tree in Decision Tree Builder
- Edit a decision tree in Core UI
- Add Guided Decisions to playbooks
- Add Guided Decisions to Recommended Actions
- Add Guided Decisions to Service Portal

Agents interact with decision trees as part of a recommended action or as part of a playbook within a record, such as a case.

Customers and end-users interact with decision trees on Service Portal.

For guided decisions that are added to playbooks, agents can work through the decision trees and complete actions suggested in the guidance as part of a playbook stage or activity. How the agent interacts with the decision tree depends on the playbook configuration. For more information, see the following topics:

- Use Guided Decisions in playbooks to resolve cases
- Use Guided Decisions in recommended actions to resolve cases

Request apps 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.

Decision trees in Guided decision

Decision trees and guidances enable agents to work through a structured troubleshooting process to resolve customer issues faster and provide standardized resolution.

Decision trees

A decision tree is a multi-step process that includes a series of questions, answers, and a guidance for an agent to follow. This process is made up of different decision tree elements, including nodes, inputs, and paths. For more information, see Decision tree elements.

Decision trees contain different types of nodes. Decision nodes represent one or more questions. Guidance nodes provide recommendations to agents. Each decision tree has a root node called the start node. Each node includes a path to the next node. Based on the answers to the questions, each decision node leads to an outcome, which can be a guidance, a follow-up question, or another decision tree.

Guidances

A guidance is an action that an agent can take or information that an agent can share. For example, a guidance can recommend that the agent can share a knowledge article or create a work order. Agents can perform the action by clicking a button on the card.

For more information about creating a decision tree, see the following topics:

- Configuring decision trees in Decision Tree Builder
- Create a decision tree in Core UI

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Decision tree elements

Decision trees are made up of several types of elements including nodes, inputs, and paths.

Decision trees are built using different elements, which are described in the following table. The terminology for these elements differs slightly between Decision Tree Builder and Core UI but the definitions remain the same. For more information decision tree nodes and paths, see Decision tree nodes and Decision tree paths.

Core UI terms, decision tree builder terms, and definitions

Core UI term	Decision Tree Builder term	Definition
Decision tree	Decision tree	A multi-step process that includes a series of questions and answers. Based on the answers, each question in a decision tree leads to another question, a guidance for the agent to follow, or another decision tree.
Node	Node	A node is a point in a decision tree. You can create different types of nodes depending on what is happening at that point in the tree. Node types include the following: • Start node • Question node • Guidance node • Linking node
Start node	Start node	The first node in a decision tree. When you create a decision tree, the system automatically creates the start node. The start node can be a question or a task.
Decision node	Question node (When adding a node and selecting **Ask users at least one question** in the pop-up window)	This type of node represents one or more questions. The answers to the questions lead to an outcome, which can be another question, a guidance, or another decision tree.
Guidance node	Guidance node (When adding a node and selecting **Propose a guidance as an outcome** in the pop-up window)	This type of node has a reference to a guidance, which provides a recommendation to an agent.
Linking node	Linking node (When adding a node and selecting **Link**	A linking node includes a reference to another decision tree. This linking connects the execution of the primary decision tree

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Core UI terms, decision tree builder terms, and definitions (continued)

Core UI term	Decision Tree Builder term	Definition
	decision tree in the pop-up window)	to another decision tree when a specific condition is met.
Guidance	Guidance	An action that an agent can take or information that an agent can share. You can select guidances included with the Guided Decisions Experience plugin or you can Create a guidance in the Core UI.
Decision input	Question or instruction	A question or instruction with a configured answer type. When working through a decision tree, an agent can provide an answer to the question in the format of answer type that you configure.
Input type	Type of answer	The type of data that the question in a question node can accept as an answer, such as string, integer, or choice. For a list of supported input types, see Answer types for questions.
Decision input mapping	Link input	Linking inputs from one decision tree node to another to reuse input values in prior decision tree nodes.
Label (for a node)	Node name	The name for a question, guidance, or linking node. In Decision Tree Builder, this name appears on the node in the canvas.
Type (for a node)	Node purpose	The type of a node in the Decision Tree Node record in Core UI. The purpose of a node in the right panel in Decision Tree Builder. • Question node: Ask users at least one question • Guidance node: Propose a guidance as an outcome
Not applicable	Path	A path connects two nodes in a decision tree or question node to the start node of the next decision tree. A path is created and associated with a node and represents the potential outcome of that node.
Decision path	Not applicable	A path that provides possible outcomes of a decision node. A decision path links a decision node to the next node of type decision.

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Core UI terms, decision tree builder terms, and definitions (continued)

Core UI term	Decision Tree Builder term	Definition
Guidance path	Not applicable	A path that links a decision node to the next node of type guidance.
Linking path	Not applicable	A path that links a decision node to the start node of the next decision tree.
Order	Path priority	The priority in which the path is executed.

Decision tree nodes

Decision trees include several types of nodes, including start nodes, question nodes, guidance nodes, and linking nodes.

A decision tree begins with a start node, which presents the first set of questions to an agent. The start node is typically followed by a question node, which asks another set of questions. A question node can be followed by another question node, a guidance node, which provides a recommendation to an agent, or by a linking node, which includes a reference to another decision tree.

You can enable agents to modify their responses in previous nodes:

- Agents can go back to the previous node by selecting the **Back** button.
- Agents can jump to any previous node by selecting the Edit icon ( ) in the View my responses tab.

For more information, see Create a decision tree in Core UI and Add questions or instructions to a decision tree.

Start nodes

A start node is the first node in a decision tree. When you create a decision tree, you provide internal and external names, a title and short description, and a name for the action label. After saving the record, the system creates the decision tree and the start node. You can use this start node to build the rest of the decision tree.

A start node includes a minimum of one question. A start node always has a task input of reference type so you can reuse the task input in other decision or guidance nodes via linking inputs. The task input includes a reference to the table that stores the record type that the agent is working on.

Decision or question nodes

A question node asks one or more questions. The answer to the question leads to an outcome, which can be another question, a guidance for the user to follow, or another decision tree.

A question node presents the agent with a question or instructions to follow to evaluate the customer's situation and provide the right solution. You can add HTML formatting, such as images, links, or text formatting to the question node. Examples of typical questions or instructions include:

- For resetting a password: "What is the customer's account ID?"
- For troubleshooting a faulty device: "What is the device type or model number?"

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The answers to the questions are used to create path conditions.

For more information about the available answer types, see Answer types for questions.

Note: Using unsupported input types can cause errors in the runtime experience.

Guidance nodes

A guidance node proposes a solution to a customer's issue through a reference to a guidance, which provides a recommendation to an agent. Examples of a guidance include recommending a knowledge article, creating a work order, or escalating a case.

A guidance node can be followed only by a question node. The execution of the decision tree continues after the agent performs the guidance, and the guidance history is marked as complete. You can use a question node to connect two guidance nodes.

A guidance can have outputs, which drive further decision making. With a guidance, you can do the following:

- Define output variables.
- Define values for the output variables, which are mapped in the Automation Plan flow for the guidance by the Assign Guidance Outputs flow action.
- Connect the guidance to the guidance node's next node.
- Map the outputs of the guidance to inputs for the guidance node's next node.

For descriptions of the available guidances, see Guidances included with Guided Decisions Experience application.

Users with the Decision tree author role can also create guidances to reuse in decision trees or recommended actions. For more information, see Create a guidance in the Core UI.

Linking nodes

A linking node includes a reference to another decision tree. This type of node connects the execution of the primary decision tree to another decision tree when a defined condition is met.

Linking to another decision tree is useful for complex troubleshooting or for troubleshooting that requires multiple stages.

A linking node includes the following elements:

- A linked decision tree, where the execution of the primary decision tree continues after this node is reached.
- Input mapping, which maps the inputs from the nodes preceding the linking node to the start node of the linked decision tree.
- A path, which connects the previous question node to the start node of the child tree.

For more information, see the following topics:

- For Decision Tree Builder: Link an activated decision tree to this decision tree.
- For Core UI: Link another decision tree to this decision tree

Linking inputs in decision tree nodes

Linking of inputs enables decision tree authors to reuse input values (answers) from prior nodes.

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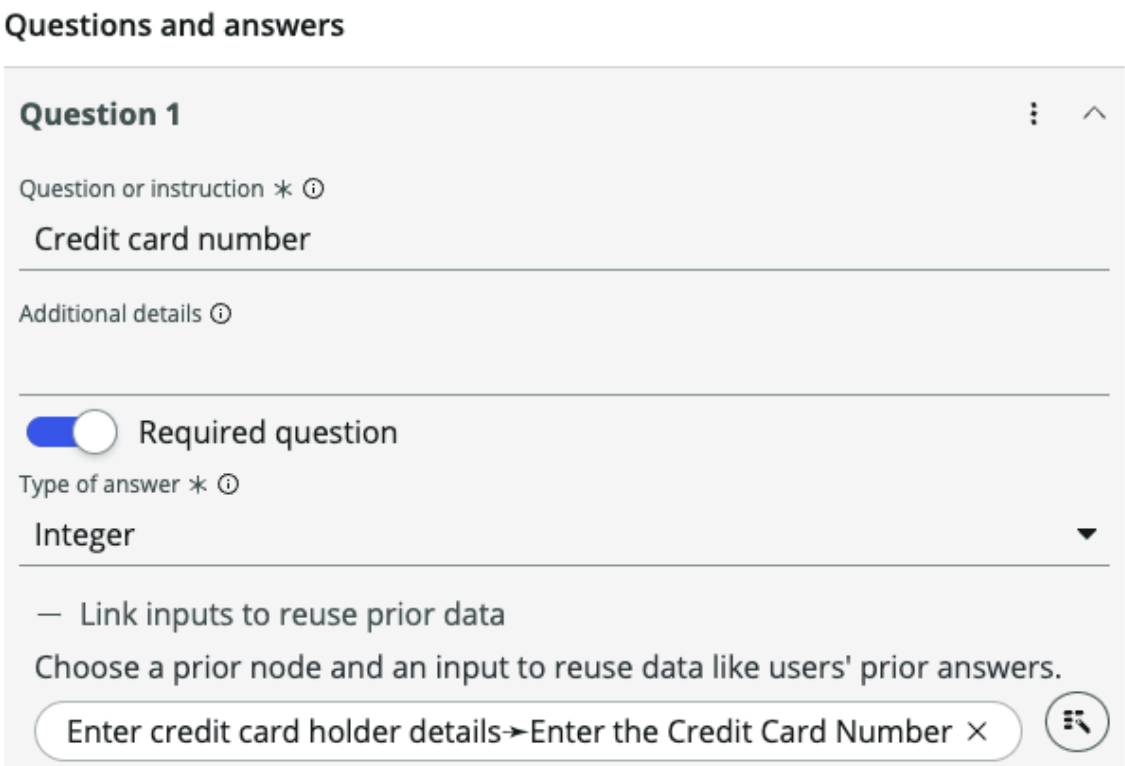
Linking inputs in question and linking nodes

Most questions are presented to an agent to provide answers. When you link an input to another input, the question is not displayed to the agent. Because the input reuses values from the input it is linked to, the agent does not need to provide any answer.

Similar to other inputs, you can use linked inputs to create path conditions.

Example of linking inputs in a question node

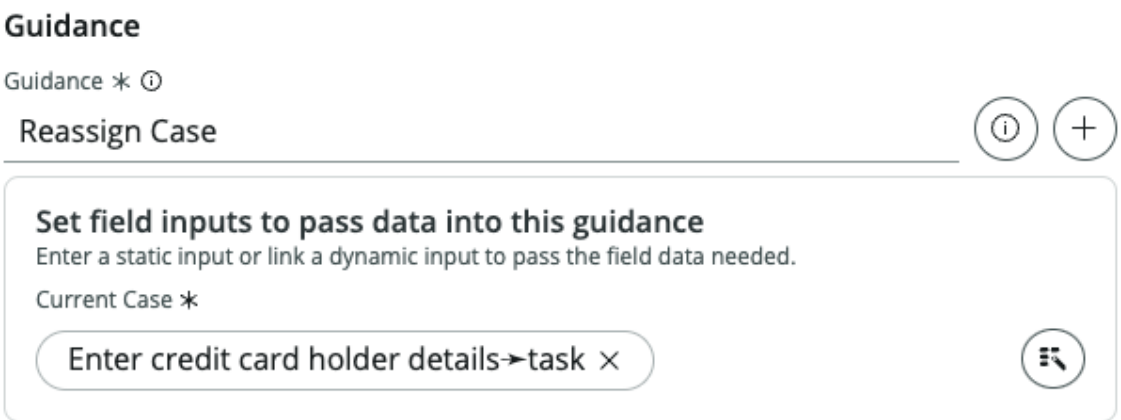


For example, if you have already asked the credit card number in the start node, you can reuse that input in the following question node. This question is not presented to the agent again and the value is automatically filled out during run time.

Linking inputs in guidance nodes

With linking inputs, you can reuse the answers that customer provided to supply input values to the guidance inputs. You can link the task input in the start node to the guidance inputs to pass the information about the record that the agent is working on.

Example of linking inputs in a guidance node



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For example, you can connect the start node's task input to the following guidance. The task input holds a reference of the record the agent is working on in a workspace. You need a case number, which is provided by the task input, for reassigning the case to someone else.

Special cases for linking inputs

In most cases, you can only link inputs to other prior node's inputs of the same type. For example, you can link a string input field type to another string input field type.

The Guided Decisions Experience application supports the following special cases.

Cases supported in the Guided Decisions

Input type	Description
String input field type	Accepts any type of field to be linked. For example, string accepts integer, decimal, choice, and others. String is a text field which accepts any characters.
Reference input field type	Accepts only reference type of field. You can link reference input types only if the current question node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table.
Choice input field type	Accepts choice type and string type because a choice in a choice list is a string.
Date and Date/Time input field types	Accepts the following types: • `glide_date_time` • `glide_date` • `date` • `datetime` • `due_date` • `calendar`

Note: The Guided Decisions Experience application does not support `glide_var` type fields to map to any inputs.

Decision tree paths

A path is created and associated with a node and represents the potential outcome of that node.

When you create a path, you provide a name, a priority, and the path conditions.

Field	Description
Path name	The path name appears in the decision tree.

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Field	Description
Path priority	The priority determines which path and its conditions get checked first when there are multiple paths. A node can have more than one path but only one path from a node can be executed at a time. For example, a path with a priority of 100 has a lower priority value than a path with a priority of 200. Therefore, so only path with priority 100 is executed.
Path conditions	Path conditions represent the potential answers or outcomes from a node. You create path conditions using a condition builder, which has access to its direct parent node's inputs. It uses these inputs to create informative path conditions that represent potential answers or outcomes for the node. Path conditions must be met in order to go to the path's destination node.

- Decision Tree Builder: Determine the next node displayed in a decision tree
- Core UI: Determine the next node in a decision tree

Example configuration of a decision tree

This example demonstrates an end-to-end configuration of a decision tree to help you get started with Guided Decisions. After you configure the decision tree, you can either embed it in a playbook or use it as a recommendation in Recommended Actions.

For more information about decision trees, see Decision trees in Guided decision and Configuring guidances and decision trees.

Troubleshooting a failed credit card transaction

Paul, who holds an account with the StellarVest bank is trying to purchase a smart watch using their credit card. But the transaction failed at the time of payment. Paul created a case in the StellarVest bank portal seeking assistance. Agents from the StellarVest bank work on the cases created by customers to resolve their issues.

In this scenario, the agent assigned to the Paul's case uses a decision tree to troubleshoot the failed credit card transaction. The decision tree collects user, credit card, and transaction details. If money was debited, transaction tracking is initiated. However, if no money was debited, the agent provides a failure code which determines what guidance is provided. Examples of potential guidances include: reassigning the case, creating a work order, or assigning the case to an IT technician.

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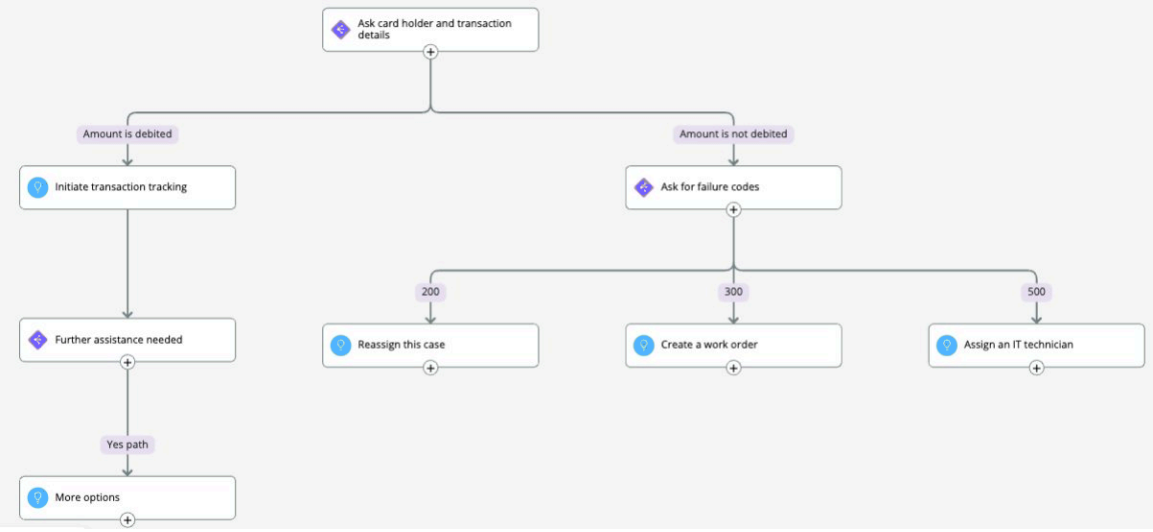


Creating the decision tree to troubleshoot the failed transaction

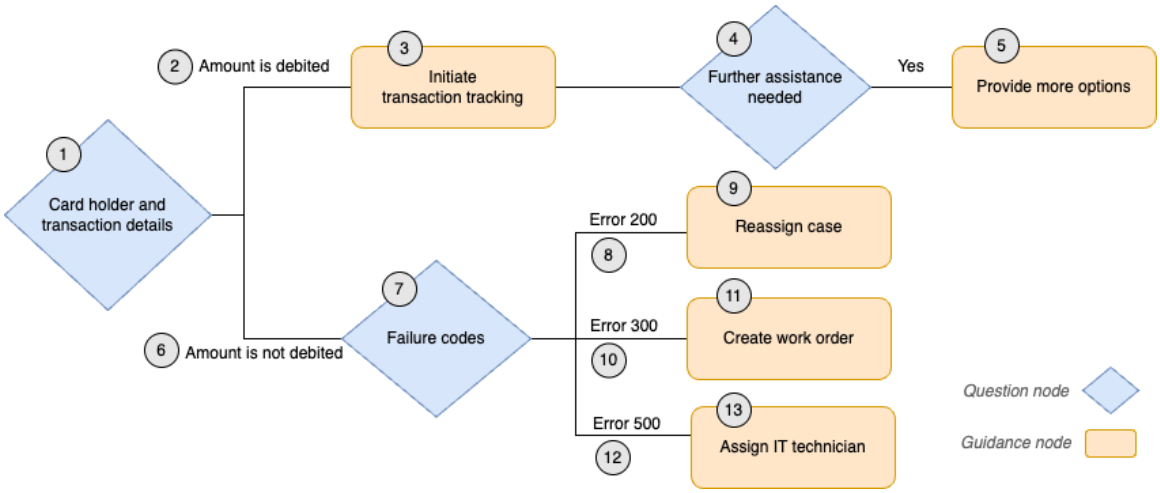
Learn how process analysts or business owners create a decision tree, and configure various decision tree nodes in the next pages.

Preparation for creating a decision tree

Before configuring a decision tree, process analysts should document the flow of the decision tree using a flow chart including the questions, answers, associated paths, and guidance.

Anita, who is a process analyst at the StellarVest bank wants to create a decision tree that enables agents to troubleshoot a failed credit card transaction.

Anita first creates a flowchart to document the flow of a decision tree to determine the questions, answers, and possible guidance to configure.



Flow chart for decision tree

No.	Element	Name	Description
1	Start node	Card holder and transaction details	Start node that collects customer, credit card, and transaction details.
2	Path	Amount is debited	Path with condition: Amount is debited.

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Flow chart for decision tree (continued)

No.	Element	Name	Description
3	Guidance node	Initiate transaction tracking	Guidance to initiate transaction tracking when amount is debited.
4	Question node	Further assistance needed	Ask whether the customer needs further assistance.
5	Guidance node	Provide more options	Guidance to provide more options such as talk to an agent or request a new card.
6	Path	Amount is not debited	Path with condition: amount isn't debited.
7	Question node	Failure codes	Collect transaction failure codes when amount isn't debited.
8	Path	Error 200	Error code received is 200.
9	Guidance node	Reassign case	Guidance to reassign the case to someone else.
10	Path	Error 300	Error code received is 300.
11	Guidance node	Create work order	Guidance to create a work order for dispatching a new credit card.
12	Path	Error 500	Error code received is 500.
13	Guidance node	Assign IT technician	Guidance to assign an IT technician to resolve the issue.

Create a decision tree for troubleshooting a failed transaction

Help Anita create a decision tree that agents can use to troubleshoot a failed credit card transaction. After this step, the decision tree can be configured in Decision Tree Builder.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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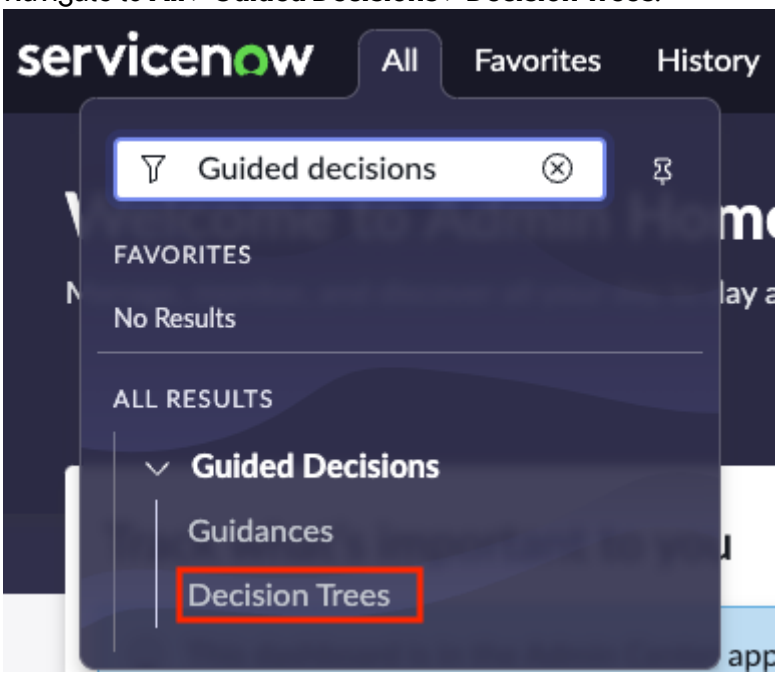
Procedure

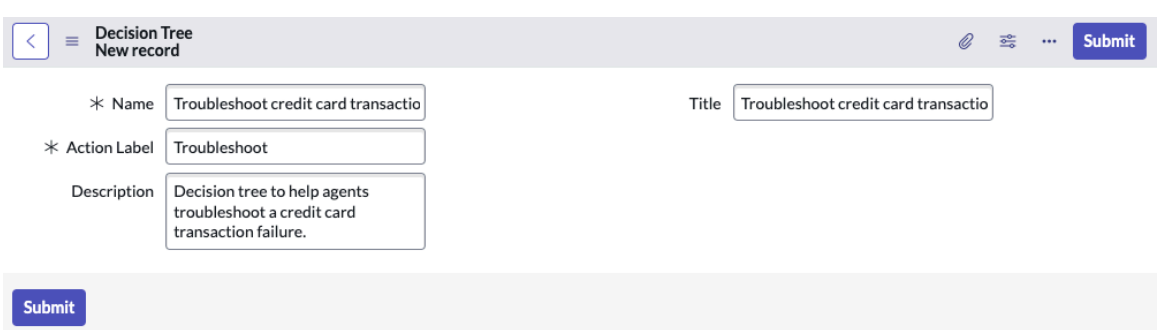
1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.



2. Select **New** on the Decision Trees list.
3. On the form, fill in the fields.

Decision tree form for troubleshooting a failed transaction

Field	Description
Name	Type `Troubleshoot credit card transaction failure`.
Action Label	Type `Troubleshoot`.
Description	Type `Decision tree to help agents troubleshoot a credit card transaction failure`.
Title	Type `Troubleshoot credit card transaction failure`.
Question font size	Enter the desired font size for the questions in the guided decision tree. Example: `14`
Show a dismiss button	Select this check box if you want the Dismiss button to appear on recommendation for the agent.



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4. Select **Submit**.
   The **Open in Builder** button is shown.

What to do next

Configure the start node to ask for the user, card, and transaction details and determine if any amount was debited.

Create the Initiate transaction tracking guidance

Create the Initiate transaction tracking guidance by configuring inputs, outputs, preview experience and detail experience.

Before you begin

Role required: sn_gd_guidance.guidance_manager

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Create a guidance.
   a. Select **New** in the Guidances list.
   b. In the **Name** field, enter `Initiate transaction tracking`.
   c. In the **Description** field, enter `Guidance for tracking the failed credit card transaction`.
3. Create the following inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.

   a. In the Guidance Input tab, select **New** for each input.

   b. Create the following inputs and select **Submit**.

   Guidance inputs

Label	Type	Reference	Order	Is form field
Cardholder name	String	-	100	true
Task	Reference	Case	200	false
Credit card number	Integer	-	300	true
Transaction ID	Integer	-	400	true
Date and time of transaction	Date/time	-	500	true

4. **Optional:** Create an output for the guidance.
   Outputs are the desired result of the guidance action. For example, if a guidance action creates a case task, the output of that action can return a reference to the case task that was created.
   a. In the Guidance Output tab, select **New**.
   b. In the **Label** field, enter `Case number for transaction tracking`.

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c. In the **Type** field, select Reference.

d. In the **Reference** field, select the Case table.

e. Select **Submit**.

5. Configure the preview and detail experiences.
   For more information, see Configure guidance detail experience.

6. Select **Submit**.

What to do next

Configure a guidance action that an agent can take while initiating transaction tracking.

Create a guidance action for the Initiate transaction tracking guidance

Configure the actions that agents can take to initiate a transaction tracking.

Before you begin

Role required: sn_gd_guidance.guidance_manager

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Select the Initiate transaction tracking guidance from the Guidances list.
3. In the Guidance Actions form section, select **New**.
4. On the Guidance Action form, fill in the fields.

Field	Description	Value
Guidance	The guidance that this action is associated with. This field is read only.	Initiate transaction tracking
Action label	A name for this guidance action.	Initiate
Call to Action Label	The label for the action button that appears on the recommendation card in the contextual side panel. For example, **Review and attach article** or **Propose Solution**.	Initiate
Action Behavior	The selected behavior for the guidance action: ○ **Single click**: The action is initiated and completed with one click and the card moves to the **History** tab in the side panel. Useful for simple actions such as escalating a case. ○ **Open in Contextual Side Panel**: The action opens in a detailed view within the side panel. The agent can review the details in the side panel, such as reviewing	Single click

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Field	Description	Value
	the content of a knowledge base article. ○ **Open in Sub Tab**: The action opens in a separate tab. You can configure the preview experience for all the action behaviour types and configure the detail view for the actions that open in the sub tab or contextual side panel. For more information, see Configure guidance detail experience. **Note:** Actions that open in the contextual side panel or in the subtab don't move to the in-progress state. The action moves to the in-progress or completed state only when the agent clicks the action button in the detail view.	
Primary	Denotes the guidance action as a primary action. This field is enabled by default. A primary action highlights the action that the agent should take and makes that action available as a button on the recommendation card. **Note:** A guidance can have only one primary guidance action. If this field is not selected, the guidance action is a secondary action available through the more actions menu on the recommendation card.	Select the field
Application	The application that this guidance action is associated with. This field is read only.	Global
Guidance Action Automation	The flow associated with this guidance action.	Initiate transaction tracking subflow
Order	The order of the action.	100
Completion Message	The message that appears at the top of the recommendation	The transaction tracking is initiated.

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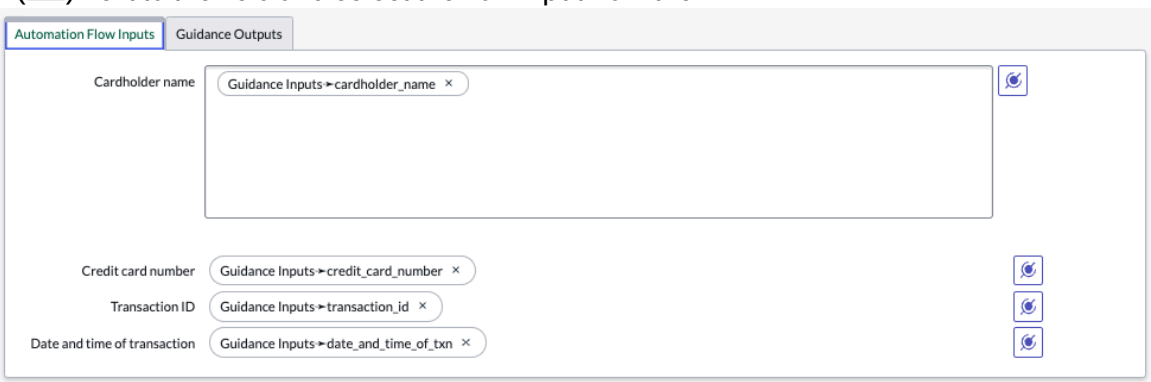
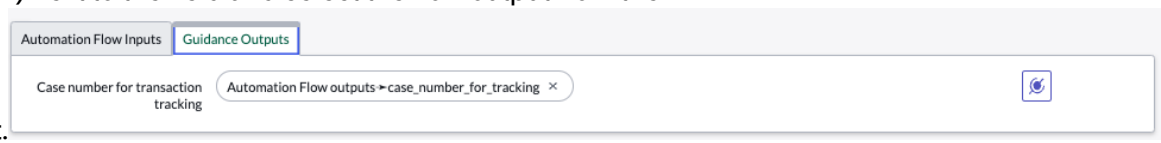
Field	Description	Value
	card when the guidance action is complete.	

5. Right-click the form header and select **Save**.
   Depending on the selected flow in the **Guidance Action Automation** field, the flow inputs and outputs are shown.
6. Configure the flow inputs and guidance outputs.
   - In the **Automation Flow Inputs** tab, select the Pill-picker icon ( ) next to the field and select the flow input from the list.



   - In the **Guidance Outputs** tab, select the Pill-picker icon ( ) next to the field and select the flow output from the list.



7. Select **Submit**.

Configure the start node for cardholder and transaction details

Add questions to ask for credit cardholder details and transaction details and configure answer types in a start node in Decision Tree Builder.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

In the question node, you can add the questions that you want to ask customers or details that you want to collect. For example, you can ask for the type of credit card or whether any amount is debited. Based on the answers provided, the path to a next question or guidance node is taken.

Procedure

1. Select **Open in Builder**.

   The new decision tree opens in Decision Tree Builder in a new tab.

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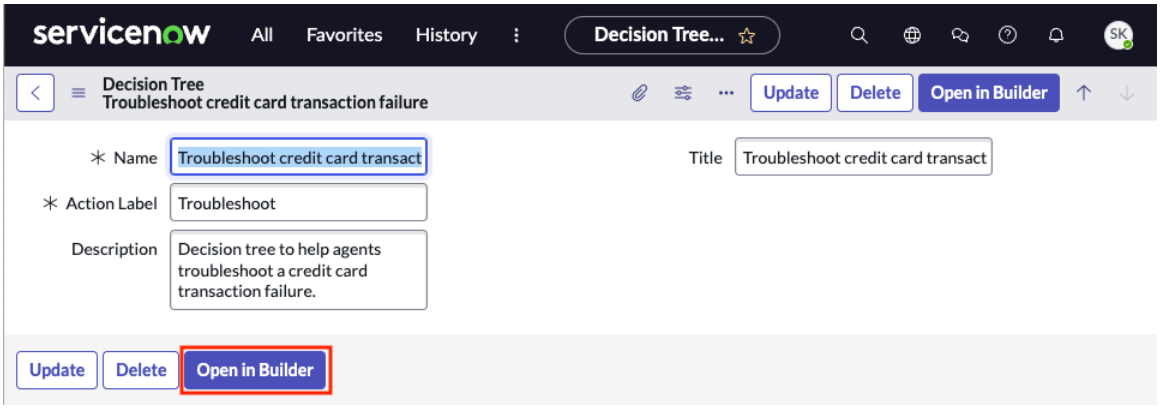
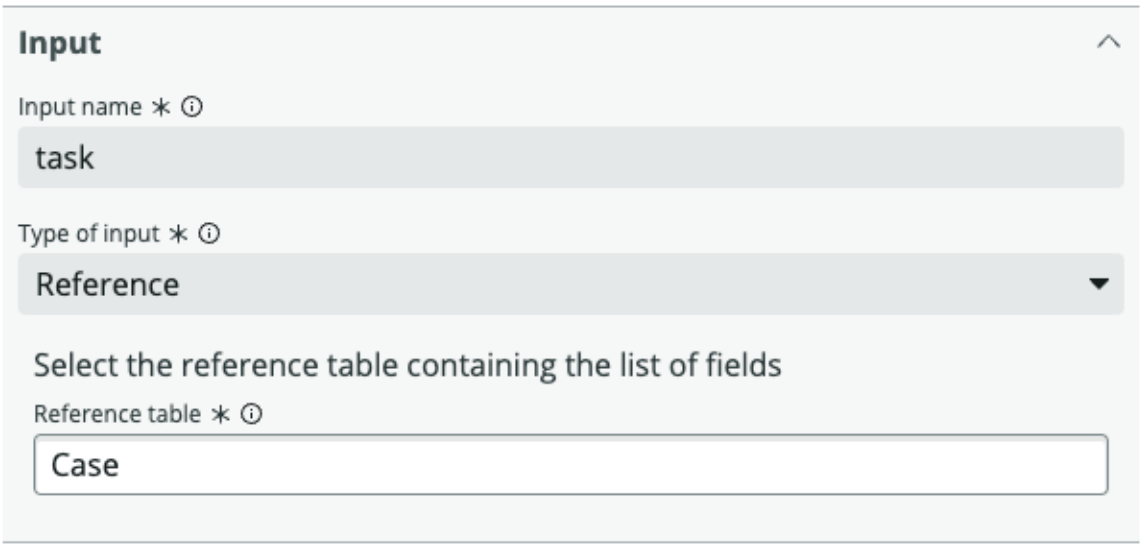


2. Select **New node**, which is a start node of your decision tree.
3. In the **Node name** field, enter `Ask card holder and transaction details`.
4. In the Input section, in the **Reference table** field, select the Case table.



The reference table doesn't necessarily have to be a task table. For example, you can select a case, incident, or interaction table for the record context to recommend this decision tree in a workspace.

> **Note:** You must select the same table as the reference table for the context record in Recommended Actions.

5. Configure question 1.
   a. In the **Question or instruction** field, type `Enter your name`.
   b. Make this question a required question by selecting the **Required question** field.
   c. In the **Type of answer** field, select String.

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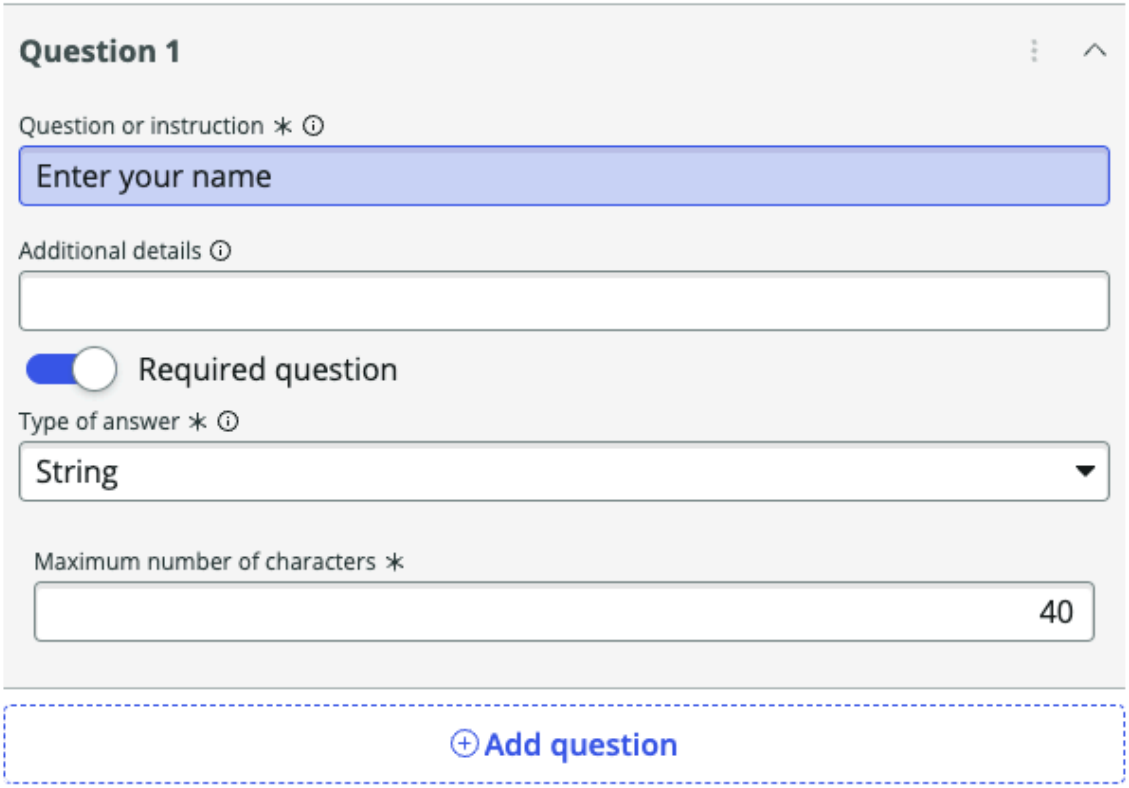
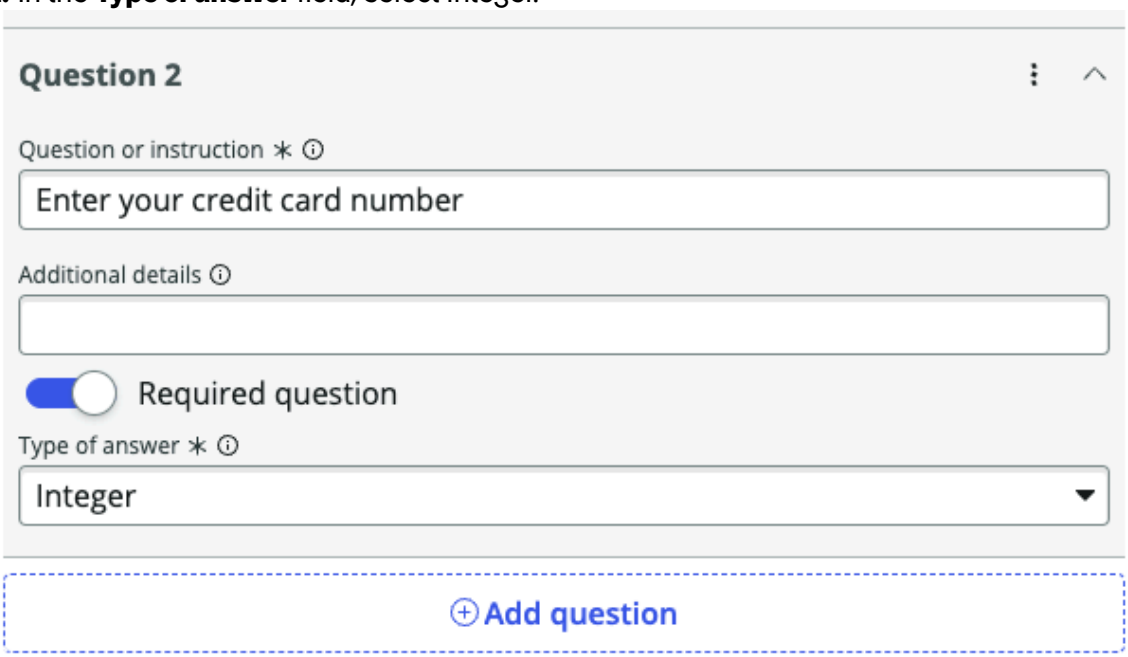


6. Configure question 2.
   a. Select the **Add question** button.
   b. In the **Question or instruction** field, type `Enter your credit card number`.
   c. Make this question a required question by selecting the **Required question** field.
   d. In the **Type of answer** field, select Integer.



7. Configure question 3.
   a. Select the **Add question** button.
   b. In the **Question or instruction** field, type `Enter the transaction ID`.

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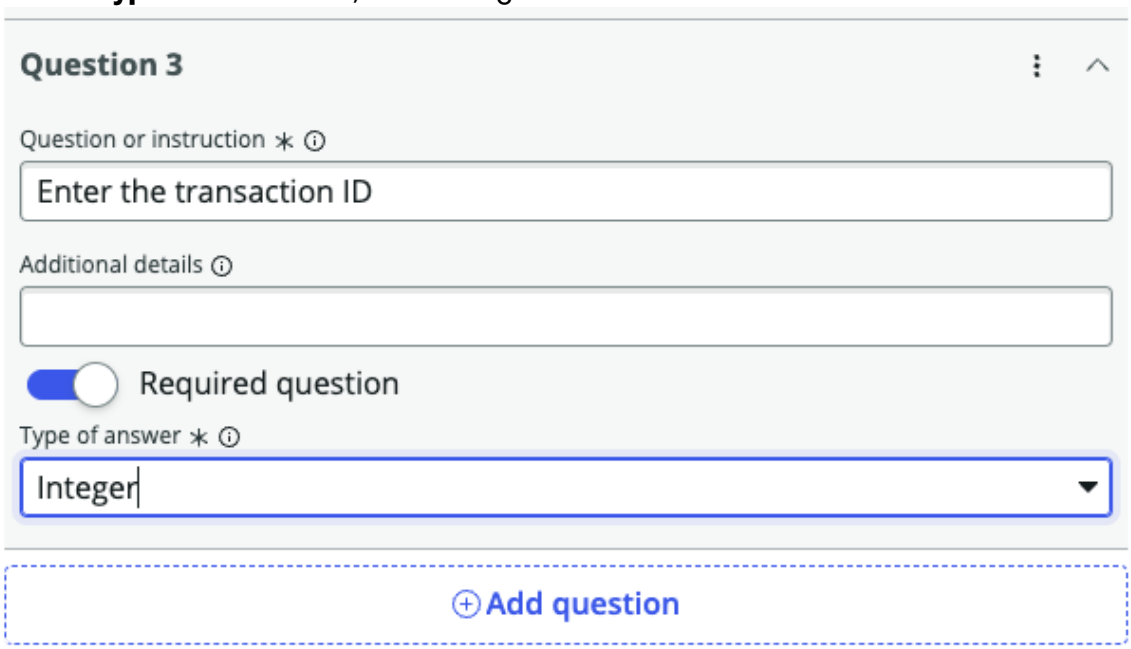
c. Make this question a required question by selecting the **Required question** field.

d. In the **Type of answer** field, select Integer.



8. Configure question 4.

a. Select the **Add question** button.

b. In the **Question or instruction** field, type `Select the card type`.

c. Make this question a required question by selecting the **Required question** field.

d. In the **Type of answer** field, select Choice.

e. In the **Label** field, enter `Visa` for the first option in the list.

f. Select **Add choice**.

g. In the **Label** field, enter `MasterCard` for the second option in the list.

h. Select **Add choice**.

i. In the **Label** field, enter `Meestro` for the third option in the list.

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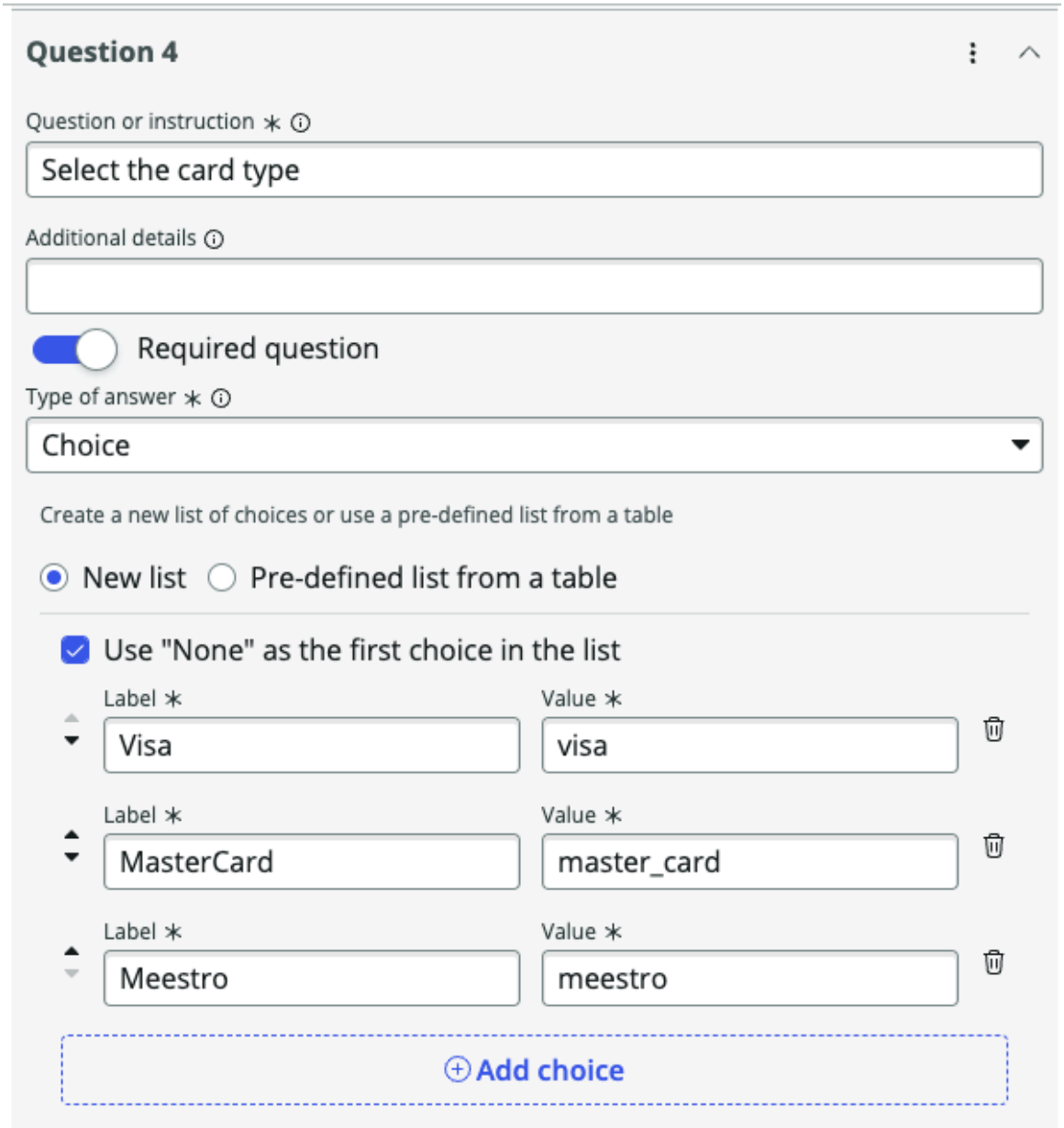

9. Configure question 5.
   a. Select the **Add question** button.
   b. In the **Question or instruction** field, type `Select date and time of the failed transaction`.
   c. Make this question a required question by selecting the **Required question** field.
   d. In the **Type of answer** field, select Date/time.

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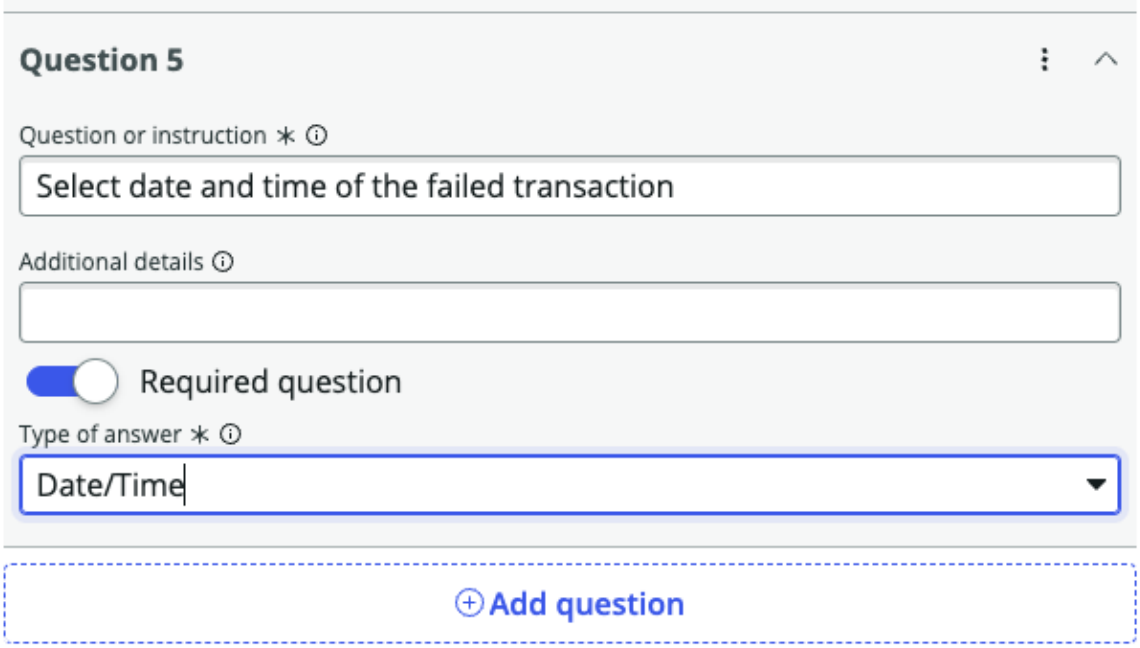
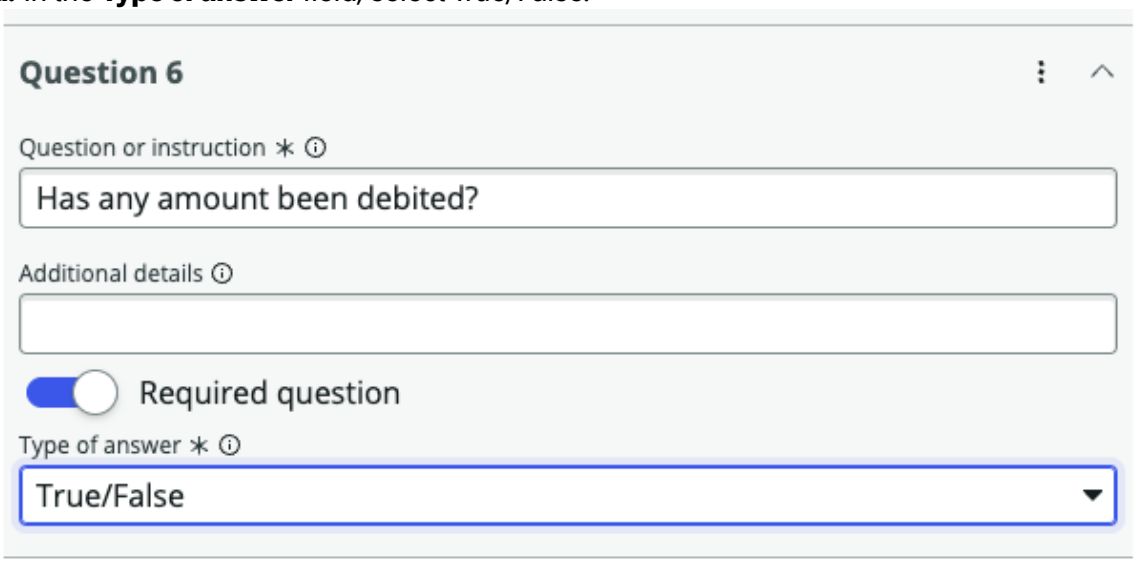


10. Configure question 6.
    a. Select the **Add question** button.
    b. In the **Question or instruction** field, type `Has any amount been debited?`.
    c. Make this question a required question by selecting the **Required question** field.
    d. In the **Type of answer** field, select True/False.



11. Select **Save and close**.

What to do next

Add paths and configure conditions for transactions when the next question or guidance node is displayed in a decision tree.

Configuring paths with conditions whether the amount is debited or not

Configure paths with conditions to determine the next question or guidance node that is displayed in a decision tree.

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- If any amount is debited during a failed transaction, the path that leads to the Initiate transaction tracking guidance is taken.
- If no amount is debited during a failed transaction, the path that leads to the next question node is taken.

Configure the path for the amount-debited condition

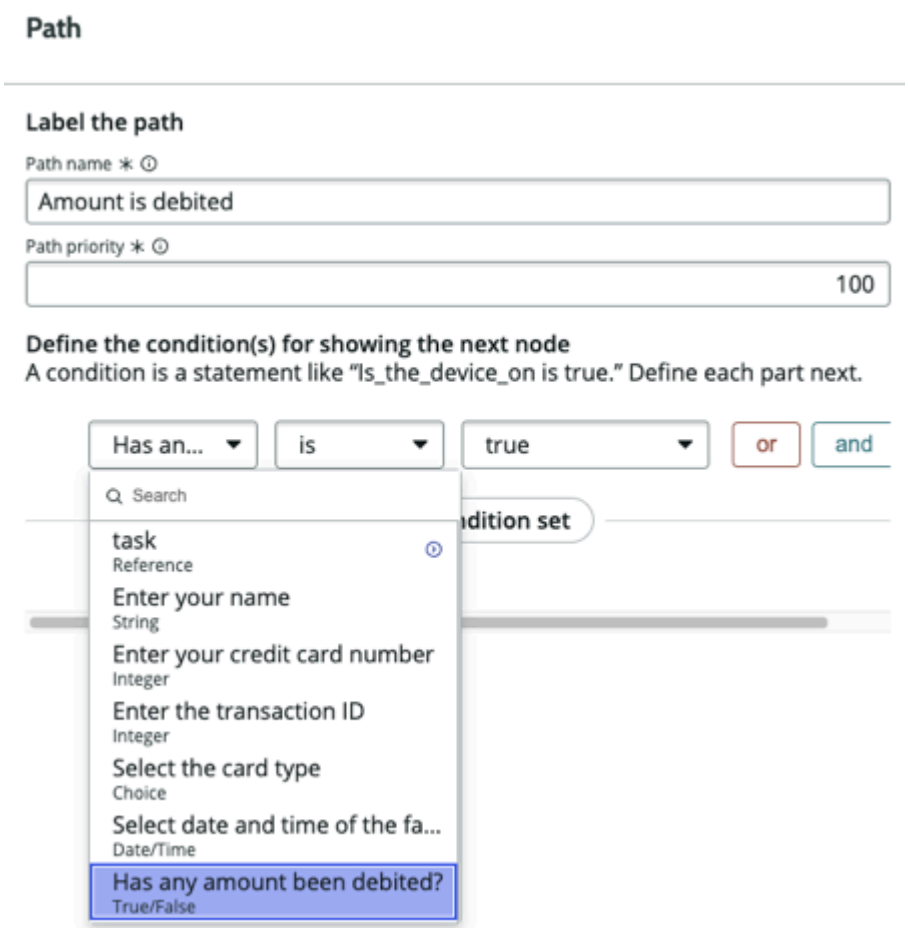
Configure a path for the amount-debited condition for the next guidance node.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When a customer answers that the amount is debited from the credit card, the path that leads to the Initiate transaction tracking guidance is taken.



Procedure

1. In Decision Tree Builder, select the Add path icon (⊕) on the start node.
   A new path and a new node are added to the canvas.

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2. Select the new path.
3. In the **Path name** field, enter `Amount is debited`.
4. In the **Path priority** field, enter `100`.
5. Select the appropriate fields to set the condition "Has any amount been debited? | is | true".
6. Select **Save and close**.

What to do next

Configure a guidance node that allows agents to initiate the transaction tracking for a failed transaction.

Configure the path for the amount-not-debited condition

Configure a path for the amount-not-debited condition for the next question node.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When a customer answers that the amount isn't debited from the credit card, the path that leads to the next question node is taken. The question node asks for failure codes that the user received.

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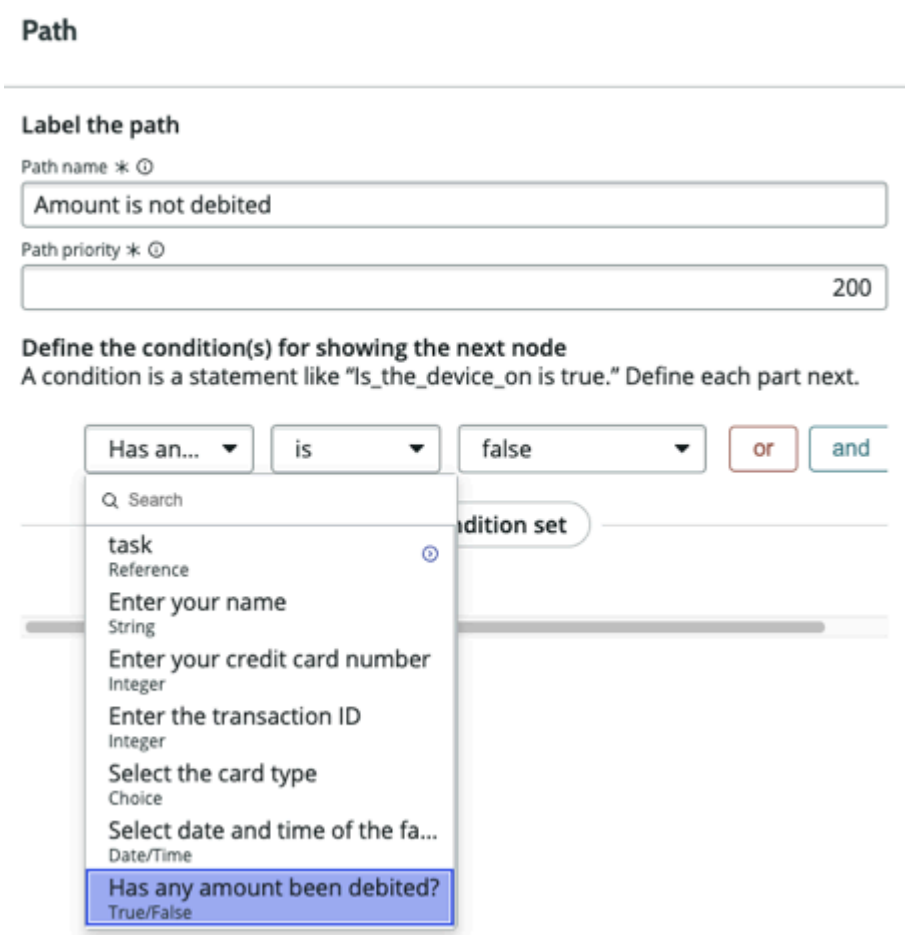

Procedure

1. In Decision Tree Builder, select the Add path icon (⊕) on the start node.
   A new path and a new node are added to the canvas.

2. Select the new path.
3. In the **Path name** field, enter `Amount is not debited`.
4. In the **Path priority** field, enter 200.
5. Select the appropriate fields to set the condition "Has any amount been debited? | is | false".
6. Select **Save and close**.

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What to do next

Configure a question node to ask for the failure codes that customer received after the failed transaction.

Configure a guidance node to initiate the transaction tracking

Configure a guidance node in Decision Tree Builder so that agents can initiate the transaction tracking.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When the customer answers that money is debited after a failed transaction, agents can create a case to initiate the transaction tracking.

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Node

Node purpose *

Propose a guidance as an outcome

Node name *

Initiate transaction tracking

Guidance

Guidance *

Initiate transaction tracking

Set field inputs to pass data into this guidance

Enter a static input or link a dynamic input to pass the field data needed.

Task

Ask card holder and transaction details➛task ×

Set more field inputs to show to users

Enter a static input or link a dynamic input to show as placeholder text in these fields.

Cardholder name

Ask card holder and transaction details➛Enter your name ×

Credit card number

Ask card holder and transaction details➛Enter your credit car... ×

Transaction ID

Ask card holder and transaction details➛Enter the transaction... ×

Date and time of txn

Ask card holder and transaction details➛Select date and time ... ×

Review this guidance's outputs

Label Case number for transaction tracking Type reference

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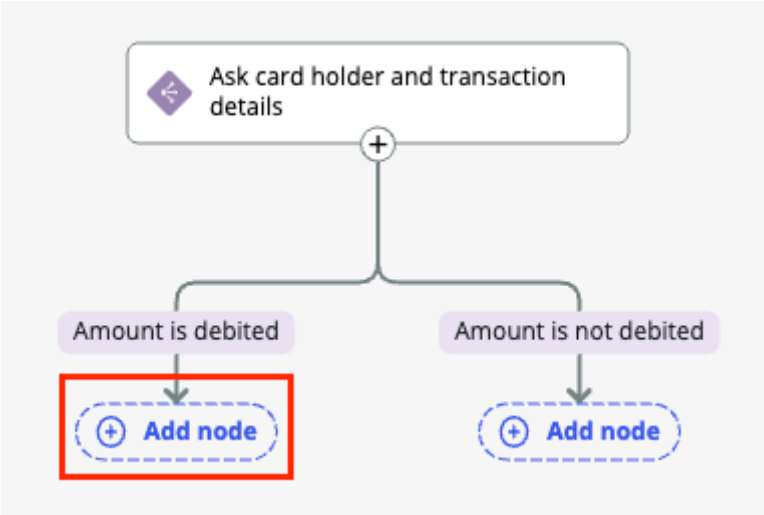
Procedure

1. Select **Add node** on the Amount-is-debited path.



2. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
   A guidance is an outcome of a decision tree.
3. In the **Node name** field, enter `Initiate transaction tracking`.
4. In the **Guidance** field, select Initiate transaction tracking guidance.
5. In the **Set field inputs to pass data into this guidance** section, link the task input from the previous question node.

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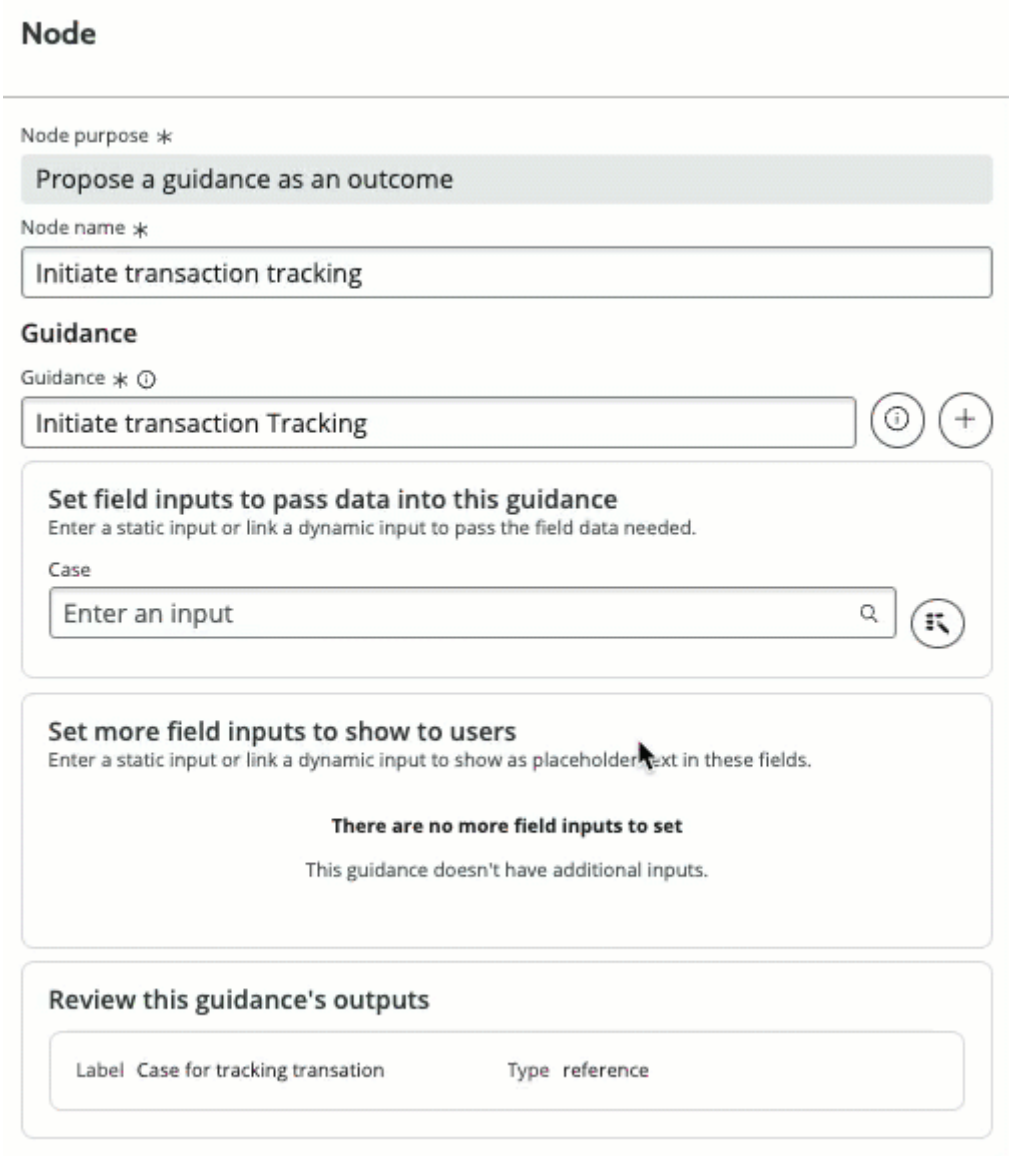

6. In the **Set more field inputs to show to users** section, link guidance inputs to the inputs from the previous question node.

   a. Select the Link input icon ( ) next to the field.

   b. Select the previous question node and the question from the list.
   The provided answer to the question is mapped to the guidance input during runtime.

7. Select **Save and close**.

What to do next

Do the following steps to add the next question node:

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1. Add a new path by selecting the Add path icon (⊕) on the Initiate transaction tracking guidance node.

   You can add a question node only after a guidance node. The execution of the decision tree continues after the guidance is performed. The path configuration isn't required because there can only be one question node after a guidance node.

2. Configure a question node for further assistance.

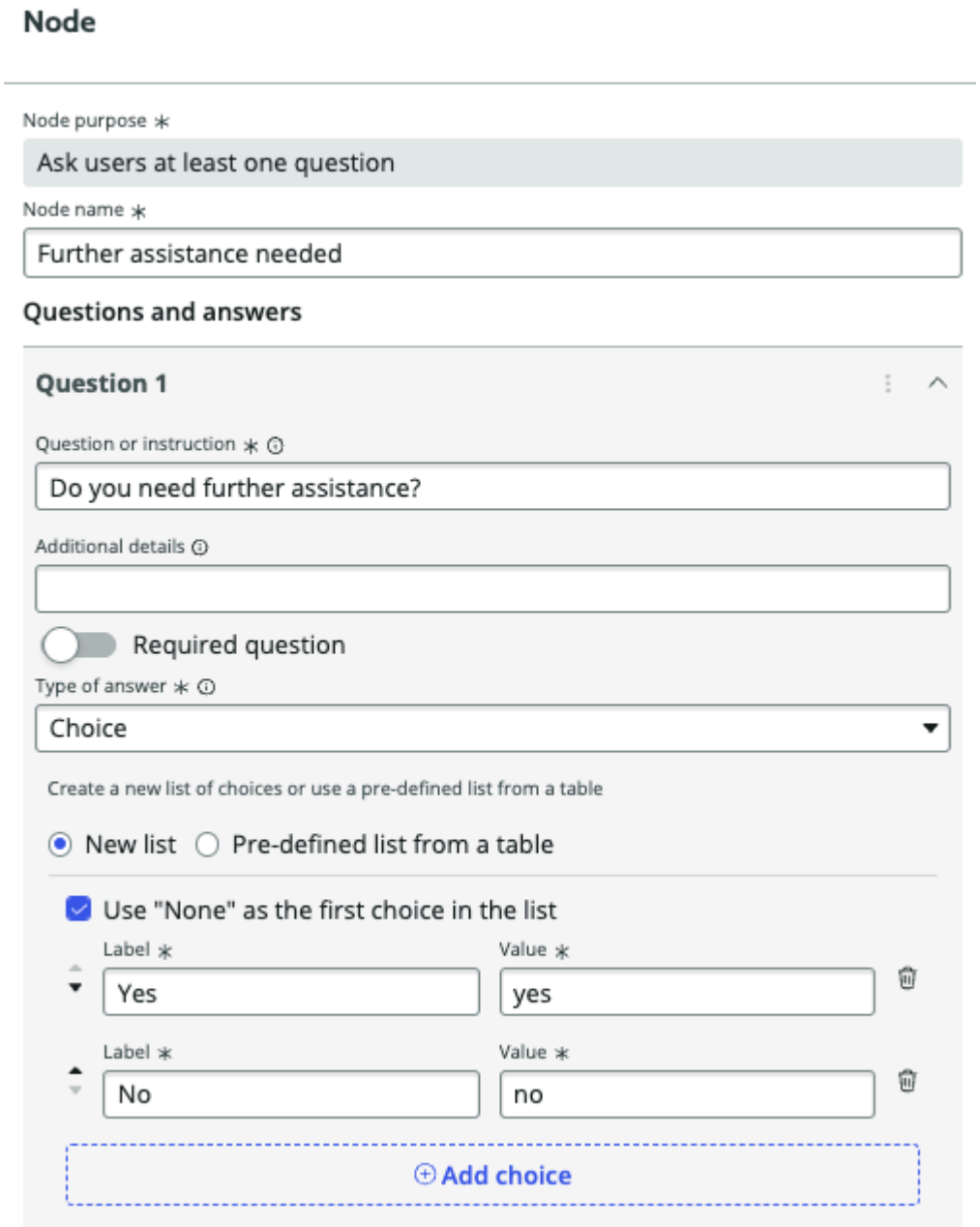
Configure a question node for further assistance

Add a question node to ask users whether they need further assistance.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task



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Procedure

1. Select **New node** on the path that comes from the Initiate transaction tracking guidance.
2. In the **Node name** field, enter `Further assistance needed`.
3. In the **Question or instruction** field, type `Do you need further assistance?`.
4. Make this question a required question by selecting the **Required question** field.
5. In the **Type of answer** field, select Choice.
6. In the **Label** field, enter `Yes` for the first option in the list.
7. Select **Add choice**.
8. In the **Label** field, enter `No` for the second option in the list.
9. Select **Save and close**.

What to do next

Do the following steps to add the next guidance node:

1. Configure a path with the condition "Do you need further assistance? | is | Yes". For more information and example, see Determine the next node displayed in a decision tree and Configuring paths with conditions whether the amount is debited or not.
2. Add a guidance node and associate the More options guidance to the Yes path. For more information and example, see Provide actions to agents in a decision tree and Configure a guidance node to initiate the transaction tracking.

Configure a question node to ask failure codes

Add a question to ask for the failure code that the customer received after a failed credit card transaction.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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About this task

Node

Node purpose *

Ask users at least one question

Node name *

Ask for failure codes

Questions and answers

Question 1

Question or instruction *

Enter the failure code

Additional details

Ask user to provide failure code they received with the transaction failure

Required question

Type of answer *

Choice

Create a new list of choices or use a pre-defined list from a table

New list Pre-defined list from a table

Use "None" as the first choice in the list

Label *	Value *
200	200
300	300
500	500

Add choice

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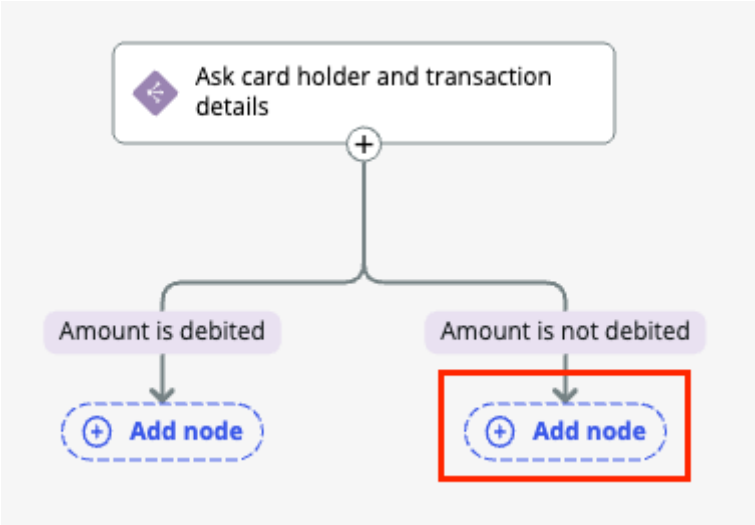
Procedure

1. Select **Add node** on the Amount-not-debited path.



2. In the pop-up window, select **Ask users at least one question** to configure a question node.
3. In the **Node name** field, enter `Ask for failure codes`.
4. In the **Question or instruction** field, type `Enter the failure code`.
5. Make this question a required question by selecting the **Required question** field.
6. In the **Type of answer** field, select Choice.
7. In the **Label** field, enter `Failure code 200` for the first option in the list.
8. Select **Add choice**.
9. In the **Label** field, enter `Failure code 300` for the second option in the list.
10. Select **Add choice**.
11. In the **Label** field, enter `Failure code 500` for the third option in the list.
12. Select **Save and close**.

What to do next

Configure a path for each failure code the customer can receive after a failed credit card transaction.

Configure paths for different failure code conditions

Configure a path for each failure code condition to provide appropriate guidance to agents.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When the failure code received by the customer is 200, the path that leads to the Reassign case guidance is taken.

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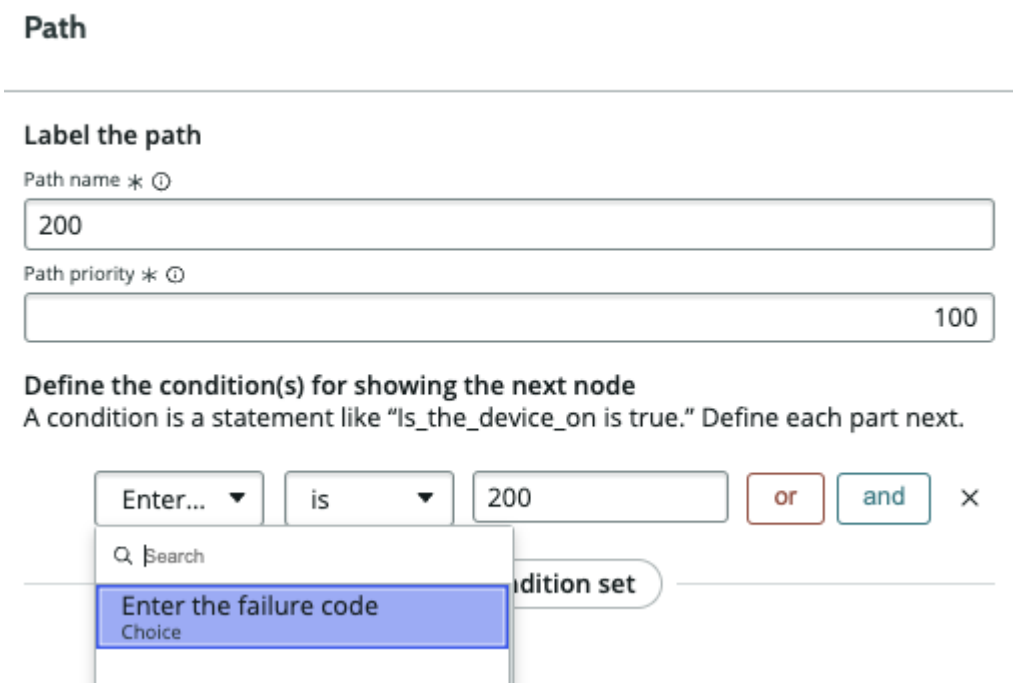

For more information about how to configure a path, see Determine the next node displayed in a decision tree.

Procedure

1. In Decision Tree Builder, select the Add path icon (⊕) on the Ask for failure codes question node.
   A new path and a new node are added to the canvas.
2. Select the new path.
3. In the **Path name** field, enter `200`.
4. In the **Path priority** field, enter `100`.
5. Select the appropriate fields to set the condition "Enter the failure code | is | true".
6. Select **Save and close**.

What to do next

Configure paths for other failure codes:

- 300 failure code - This path leads to the Create work order guidance.
- 500 failure code - This path leads to the Assign IT technician guidance.

Associate guidances for different failure codes

Associate guidances to paths with different failure code conditions.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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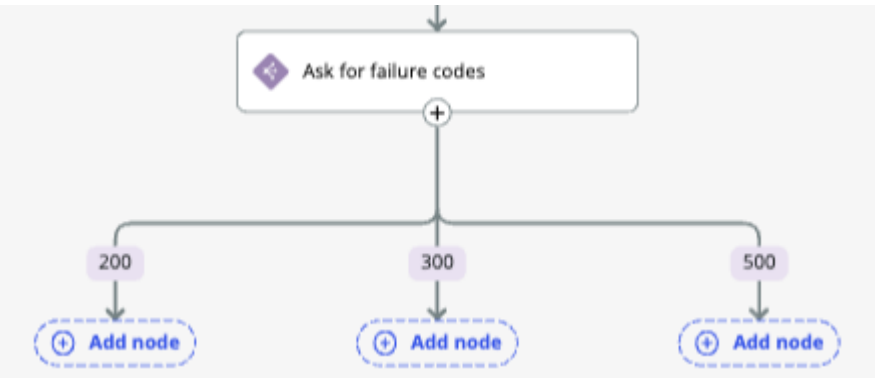
About this task



Procedure

1. Associate a guidance to the 200 path.

   a. Select **Add node** in the 200 path.

   b. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
   A guidance is an outcome of a decision tree.

   c. In the **Node name** field, enter `Reassign this case`.

   d. In the **Guidance** field, select the Reassign case guidance.

   e. In the **Set more field inputs to show to users** section, map inputs by selecting the Link input icon ( ) next to the field and selecting a guidance input from the list.

   f. Select **Save and close**.

2. Associate a guidance to the 300 path.

   a. Select **Add node** in the 300 path.

   b. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
   A guidance is an outcome of a decision tree.

   c. In the **Node name** field, enter `Create a work order`.

   d. In the **Guidance** field, select the Create work order guidance.

   e. In the **Set more field inputs to show to users** section, map inputs by selecting the Link input icon ( ) next to the field and selecting a guidance input from the list.

   f. Select **Save and close**.

3. Associate a guidance to the 500 path.

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a. Select **Add node** in the 500 path.

b. In the pop-up window, select **Propose a guidance as an outcome** to configure a guidance node.
A guidance is an outcome of a decision tree.

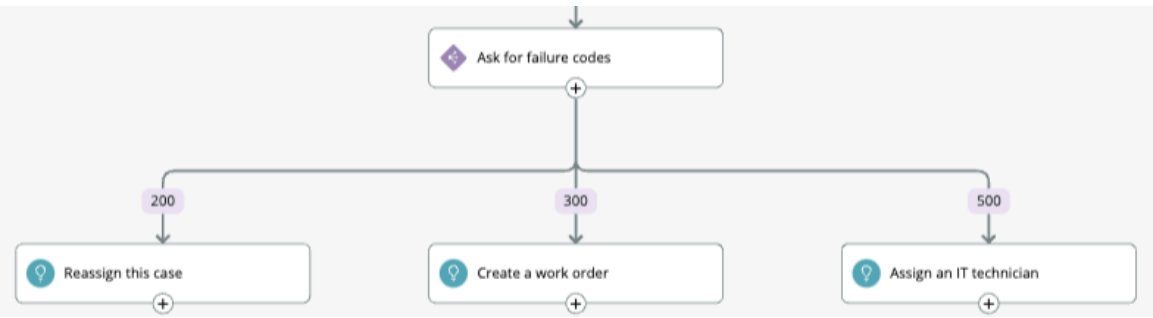
c. In the **Node name** field, enter `Assign an IT technician`.

d. In the **Guidance** field, select the Assign IT technician guidance.

e. In the **Set more field inputs to show to users** section, map inputs by selecting the Link input icon ( ) next to the field and selecting a guidance input from the list.

f. Select **Save and close**.

Result



Activate the Troubleshoot credit card transaction failure decision tree

Validate and activate the completed decision tree so you can use it in playbooks in case records or as recommendations in Recommended Actions.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When you activate the completed decision tree, Decision Tree Builder checks for errors such as missing information, invalid input mappings due to changes in prior node inputs, or missing guidance inputs. After all the errors are resolved, you can validate and activate the decision tree.

If you change an activated decision tree, remember to activate the decision tree again to display the updated decision tree in a workspace.

Procedure

1. In Decision Tree Builder, select **Activate**.
   - If there are errors in your decision tree, error icons and alert messages are displayed. You must resolve the errors before you can activate the decision tree. For more information, see Validation error notifications in Decision Tree Builder.
   - If there are no errors, a confirmation dialog box displays.
2. In the confirmation dialog box, select **Activate now**.
   A success message with instructions on the next action to take is displayed.

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Result

- The status of the decision tree is changed from **Not Active** to **Active**.
- The **Activate** button is disabled.

What to do next

- Configure recommended actions to use the activated decision tree as a recommendation. The recommendations appear as cards in the contextual side panel of a workspace. For more information, see Add Guided Decisions to Recommended Actions.
- Configure Playbooks to use the activated decision tree as part of a playbook in a record tab. For more information, see Add Guided Decisions to playbooks.

Install the Guided Decisions Experience application

You can install the Guided Decisions Experience application (sn_ga_exp) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Guided Decisions Experience application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Note: The Guided Decisions Experience[com.snc.guided_decisions_playbook_experience] plugin is planned for deprecation in the Denmark release. Existing customers who already have the plugin installed can continue to access and migrate their Guided Decision Trees to Guided Decision Playbooks. However, new customers, or customers who have not previously installed the Guided Decisions Experience plugin, must create new decision flows using Guided Decision Playbooks, as Guided Decisions is no longer available for new installations. For migration guidance, see the Guided Decisions Experience Deprecation: Migrating Guided Decision Trees to Guided Decision Playbooks KB article.

Role required: admin

About this task

The following items are installed with Guided Decisions Experience:

- Plugins
- Tables
- Roles
- Guidances

For more information, see Components installed with Guided Decisions Experience.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Guided Decisions Experience application (sn_ga_exp) using the filter criteria and search bar.

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

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Components installed with Guided Decisions Experience

Several types of components are installed with the Guided Decisions Experience application, including tables, roles, and guidances.

Tables

The following tables are added to your instance with the activation of Guided Decisions Experience.

Tables added with Guided Decisions Experience activation

Table	Description
Decision Tree [ga_decision_tree]	Stores details of all decision trees.
Decision Tree Node [ga_decision_tree_node]	Stores details of all decision tree nodes in each decision tree.
Decision Input Mapping [ga_decision_input_mapping]	Stores input-mapping details such as source node, source input, destination node, and destination input.
Decision Tree Version [ga_decision_tree_version]	Stores decision tree versions with states.

Roles

The following roles are added to your instance with the activation of the Guided Decisions, Guided Decisions Experience, and Recommended Actions plugins.

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Roles added with Guided Decisions and Recommended Actions

Role	Description	Contains roles
Decision tree author [decision_tree_author] [sn_gd_core.decision_tree_auth	Creates, views, updates, and deletes decision trees. **Note:** This role is automatically given to customer service managers.	• decision_table_admin • sn_gd_guidance.guidance_manager • decision_tree_user **Note:** Included with the Guided Decisions plugin.
Decision tree user [decision_tree_user]	Views decision trees. **Note:** This role is automatically given to customer service agents.	• decision_table_reader • sn_gd_guidance.guidance_user **Note:** Included with the Guided Decisions plugin.
Guidance manager [sn_gd_guidance.guidance_manager]	Creates, views, updates, and deletes guidances, which are outcome of a decision tree. **Note:** This role is automatically given to customer service managers.	• sn_gd_guidance.guidance_user **Note:** Included with the Guided Decisions - Guidance plugin. • metadata_scope_viewer: Grants read-only access to the Application field on metadata records within scoped applications. **Note:** Included in the Global application scope.
Guidance user [sn_gd_guidance.guidance_use	Views guidances. **Note:** This role is automatically given to customer service agents.	uxframework_user **Note:** Included with the Guided Decisions - Guidance plugin.
Playbook author [pd_content_author]	Adds decision trees and guidances to a new or existing playbook for service agents to access on their workspace.	• sn_gd_core.decision_tree_user • pd_shared.user • pd_trigger_author
Resource Generator author [sn_nb_action.resource_generator_author]	Configures resource generators.	• flow_operator • decision_table_reader • platform_ml_read • sn_nb_action.trend_definition_author

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Roles added with Guided Decisions and Recommended Actions (continued)

Role	Description	Contains roles
		Note: Included with the Recommended Actions plugin.
Trend Definition author [sn_nb_action.trend_definition_author]	Configures trend definitions.	**Note:** Included with the Recommended Actions plugin.

Granular admin users can be granted delegated developer privileges and other required roles to manage and configure metadata in scoped applications instead of assigning high-privileged admin roles. By granting granular admin users with the Manage Update Set permission, you can allow them to create and manage records within a specific application scope and track those changes in the appropriate update set. The metadata_scope_viewer role allows these granular admins to view the Application field on metadata records within scoped applications.. For more information on the delegated development, see Delegated Development.

Guidances

The Guided Decisions Experience application includes the guidances described in the following table.

Guidance involved in Guided Decisions

Guidance	Description
Apply resolution from a solved case	Enables agents apply a resolution from recommended solved cases by clicking the **Resolve case** button on a card. The action copies the resolution notes and a resolution code from the solved case into the Closure Information section of the current case. The state of the current case changes to resolved.
Communicate Workaround	Enables agents to communicate a workaround from a recommended problem record by clicking a **Communicate workaround** button on a card. The action opens the guidance in the side panel. The guidance shows the workaround from the problem record and provides a note field for the agent to add additional notes. The workaround and notes are added in the work notes and the problem record is linked to the current case.
Create case task	Enables agents to create a case task for the current case by clicking a **Create** button on

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Guidance involved in Guided Decisions (continued)

Guidance	Description
	a card, which opens the guidance in the side panel where the agent can enter a subject for a new case task and submit it.
Create Work Order	Enables agents to create a work order for a case by clicking a **Create** button on a card. Creates a work order task and opens the task in a subtab.
Link to existing defect	Enables agents to link an existing defect to the current case by clicking a **Link to defect** button on a card, which links the defect to the case and updates the work notes.
Link to existing open case	Enables agents to link the current case to an existing open case by clicking the **Link to this case** button on a card. The action sets the open case as the parent of the current case.
Offer Recommendation	Enables agents to recommend upgrade of a product to provided product model.
Propose Resolution	Enables agents to enter resolution notes and a resolution code for a case by clicking a **Propose Solution** button on a card.
Read message to customer	Enables an agent to indicate that a message was read to the customer during a call by clicking the **Mark as read** button on a card, and adding the message to the work notes.
Reassign case	Enables agents to reassign the current case to a recommended assignment group by clicking a **Reassign** button on a card, which opens the guidance in a side panel where the agent can enter notes. The current case is reassigned to a different assignment group and the work notes are updated.
Review and attach article	Enables agents to review a recommended knowledge article in the contextual side panel. They can do this by clicking the **Review and attach article** button on a card, which opens the article in the side panel. In the side panel, agents can do the following:

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Guidance involved in Guided Decisions (continued)

Guidance	Description
	• Review the article. • Attach the article to the case. • Mark the article as helpful. • Open the article in a subtab.

Configuring guidances and decision trees

Configure guidances and decision trees to resolve customer issues faster and provide standardized resolution.

Note: The Guided Decisions Experience[com.snc.guided_decisions_playbook_experience] plugin is planned for deprecation in the Denmark release. Existing customers who already have the plugin installed can continue to access and migrate their Guided Decision Trees to Guided Decision Playbooks. However, new customers, or customers who have not previously installed the Guided Decisions Experience plugin, must create new decision flows using Guided Decision Playbooks, as Guided Decisions is no longer available for new installations. For migration guidance, see the Guided Decisions Experience Deprecation: Migrating Guided Decision Trees to Guided Decision Playbooks KB article.

A decision tree is a structured troubleshooting process for service agents to work through. For more information, see Setting up Guided Decisions.

The configuration process consists of the tasks listed in the following table.

Guidance and decision tree configuration tasks

Step	Description
Create a guidance in the Core UI	Configure guidances to provide actions to your agents.
Configuring decision trees in Decision Tree Builder	Configure decision trees that agents can use to troubleshoot solutions for customer issues. You can create decision trees in Decision Tree Builder only.
Editing decision trees in Core UI	Edit the decision trees that you created using Core UI to improve or extend the troubleshooting process. Only editing of existing decision trees is supported in Core UI. You can create decision trees in Decision Tree Builder only.
Add Guided Decisions to Recommended Actions	Add decision trees to recommended actions, so that agents can take relevant actions in a troubleshooting process based on a record context.

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Guidance and decision tree configuration tasks (continued)

Step	Description
Add Guided Decisions to playbooks	Add decision trees to playbooks, so that agents can provide resolution in a troubleshooting process for their cases.
Add Guided Decisions to Service Portal	Add decision trees to Service Portal, so that internal users can leverage self-service or troubleshoot their issues.

Create a guidance in the Core UI

Create a guidance in the Core UI so that you can link the guidance to the guidance node of a decision tree. For example, your agent may attach a knowledge article or propose a solution to a customer to help resolve an issue.

Before you begin

Role required: sn_gd_guidance.guidance_manager

About this task

The preview information appears on the Recommended Actions card in the contextual side panel. The preview experience is applicable only for Recommended Actions, where agents can see previews of recommendations before launching them.

Playbooks don't have a preview experience because decision trees are embedded and considered launched already in playbooks.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Create a guidance.
   a. Select **New** in the Guidances list.
   b. On the form, fill in the fields.

Guidance form

Field	Description
Name	Name for the guidance.
Description	Brief description of the guidance.
Action available to multiple users	Makes the guidance available to multiple agents working on the case. When this option isn't selected, only one agent can work on any guidance. When the first agent works on the guidance and the state is In-progress, Completed, or Error, the other agents can't see this guidance.
Allow users to re-run the guidance	Enables agents to go back to the previous node, edit the previous nodes, or re-execute

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Field	Description
	the guidance in the runtime experience of a decision tree.
Hide completed guidance	Hides the guidance recommended for a case resolution. In other words, the completed guidance in the View my response section of a Decision Tree is not displayed for the agent. **Note:** This field is visible only when the Guided Decision Experience plugin is installed. You may need to configure the form to add this field.

c. Select **Submit**.

3. Open the guidance that you want to update.
4. Create one or more inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.

   a. In the Guidance Input tab, select **New**.

   b. On the form, fill in the fields.

Guidance Input form

Field	Description
Type	Field type of the input. Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.
Label	Name for the guidance input.
Column name	
Is form field	If the guidance input requires an action by the agent, such as adding information to a field, select the **Is form field** check box.
Order	Sequence in which the guidance input is displayed when more than one guidance input is defined.
Choice List Specification	Choices are: ▪ Dropdown without --None-- (must specify a default value) ▪ None

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Field	Description
	▪ Dropdown with --None-- None is the default value. ▪ Suggestion This tab appears when you select a value in the **Type** field.
Default value	Specifies the default value of the field for any new record. Ensure that this value uses the correct field type. For example, an integer field uses a default value of 2 but cannot use a default value of two.

c. Select **Submit**.

5. **Optional:** Create one or more outputs for the guidance.
   Outputs are the desired result of the guidance action. For example, if a guidance action creates a case task, the output of that action can return a reference to the case task that was created.

   a. In the Guidance Output tab, select **New**.

   b. On the form, fill in the fields.

Guidance Output form

Field	Description
Type	Field type of the output. (Optional) Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.
Label	Defines a unique label for the guidance output. The label appears on list headers and form fields for the output.
Column name	Defines the field name of the column. When you create a new field, this name is populated automatically based on the label.
Order	Sequence in which the guidance output is displayed when more than one guidance outputs is defined.
Default value	Specifies the default value of the field for any new record. Ensure that this value uses the correct field type. For example, an

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Field	Description
	integer field uses a default value of 2 but cannot use a default value of two.

c. Select **Submit**.

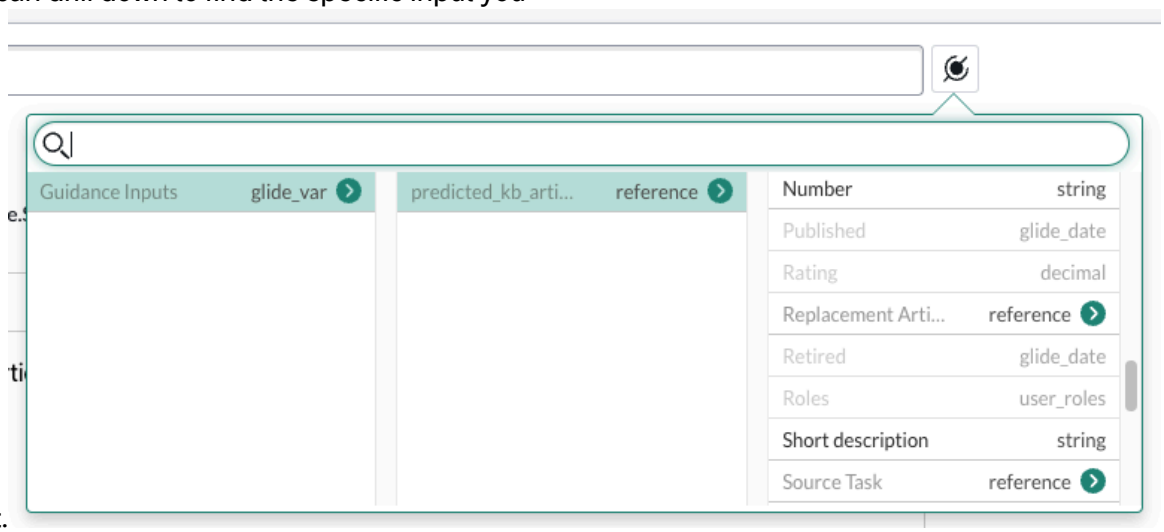
6. Configure the preview experience.

a. Select the **Preview Experience** tab.

b. In the **Preview Title** field, add a title for the guidance preview as either static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content.

- To enter static text, type the text into the field.
- To enter dynamic content, select the Pill-picker icon ( ) next to the field and select a guidance input from the list.

  You can drill down to find the specific input you want.



This field can contain static text, dynamic content, or a combination of static text and dynamic content. To select dynamic content as a field value:

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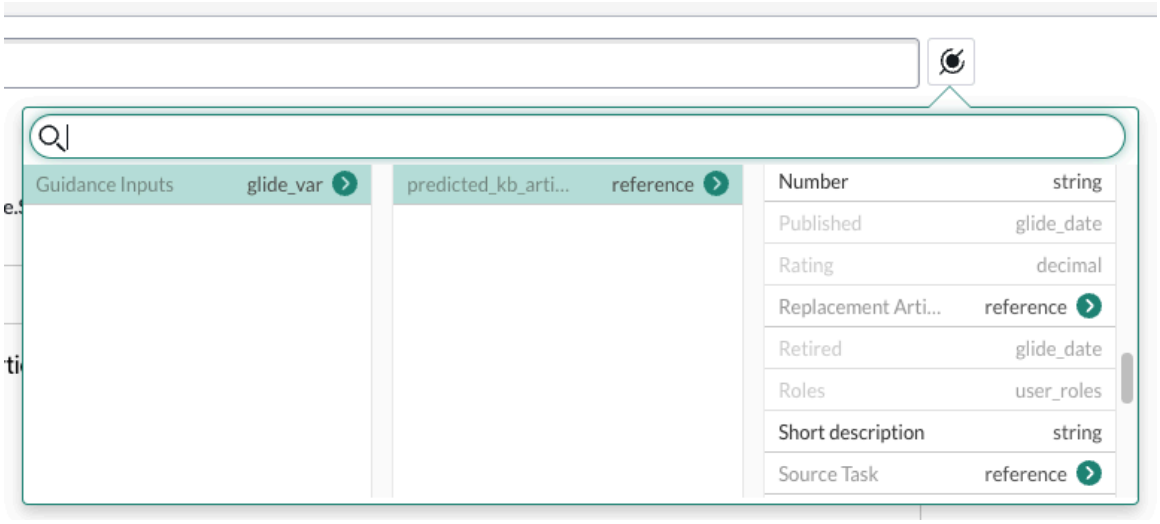
i. Select the Pill-picker icon ( ) next to the **Preview Title** field.

ii. Select a guidance input from the list. You can drill down to another level to find the input you want.



c. In the **Fields To Display** field, select fields to display in the guidance preview.

d. In the **Message** field, create a message for the guidance preview.
You can use the tools available in the rich text editor to create and format the message. This field can include text and HTML content like images, videos, and links.

7. Select **Submit**.

What to do next

Configure guidance detail experience for Recommended Actions cards.

Configure guidance detail experience

Configure guidance title and description that are displayed to users in recommended actions or playbooks.

Before you begin

Role required: sn_gd_guidance.guidance_manager

About this task

The detail information appears in playbooks, or in a contextual side panel or in a subtab for Recommended Actions for Service.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Select a guidance from the Guidances list.
3. Configure the detail experience for the guidance in the Detail Experience tab.
   The detail experience is a message that is displayed for guidances that opens in the contextual side panel or in a subtab.
   a. In the **Title** field, add a title for the guidance in the detailed view.
   b. In the **Guidance Message** field, provide a message for the detail view.
4. Select **Submit**.

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What to do next

- Customize a guidance preview experience in the UI Builder
- Customize a guidance detail experience in the UI Builder

The process for configuring a guidance is the same in the Guided Decisions Experience application and the Recommended Actions for Service application.

Create a guidance action for a guidance

Configure the actions that agents can take to resolve cases or issues.

Before you begin

Role required: sn_gd_guidance.guidance_manager

Procedure

1. Navigate to **All** > **Guided Decisions** > **Guidances**.
2. Select a guidance from the Guidances list.
3. In the Guidance Actions form section, click **New**.
4. On the Guidance Action form, fill in the fields.

Field	Description
Guidance	The guidance that this action is associated with. This field is read only.
Action label	A name for this guidance action.
Call to Action Label	The label for the action button that appears on the recommendation card in the contextual side panel. For example, **Review and attach article** or **Propose Solution**.
Action Behavior	The selected behavior for the guidance action: ○ **Single click**: The action is initiated and completed with one click and the card moves to the **History** tab in the side panel. Useful for simple actions such as escalating a case. ○ **Open in Contextual Side Panel**: The action opens in a detailed view within the side panel. The agent can review the details in the side panel, such as reviewing the content of a knowledge base article. ○ **Open in Sub Tab**: The action opens in a separate tab. You can configure the preview experience for all the action behaviour types and configure the detail view for the actions that open in the sub tab or contextual side panel. For more information, see Configure guidance detail experience. **Note:** Actions that open in the contextual side panel or in the subtab don't move to the in-progress state. The action moves to the in-progress or completed state only when the agent clicks the action button in the detail view.

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Field	Description
Primary	Denotes the guidance action as a primary action. This field is enabled by default. A primary action highlights the action that the agent should take and makes that action available as a button on the recommendation card. **Note:** A guidance can have only one primary guidance action. If this field is not selected, the guidance action is a secondary action available through the more actions menu on the recommendation card.
Application	The application that this guidance action is associated with. This field is read only.
Guidance Action Automation	The flow associated with this guidance action.
Order	The order of the action.
Completion Message	The message that appears at the top of the recommendation card when the guidance action is complete. For example, **KB article was shared**.

5. Depending on the selected flow in the **Guidance Action Automation** field, you can configure flow inputs and guidance outputs.
   - Configure flow inputs in the **Automation Flow Inputs** tab.
   - Configure outputs in the **Guidance Outputs** tab.

     These fields can contain static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content. To use dynamic content, select the Pill-picker icon ( ) next to the field and select a guidance input from the list.
6. Select **Submit**.

What to do next

Configure a guidance node and link the created guidance to this node to provide actions to agents.

Create a decision tree in Core UI

Create a decision tree that agents can use to troubleshoot solutions to customer issues.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

Decision trees are first created in Core UI. You then use Decision Tree Builder to configure the start node and add nodes and paths to build a decision tree.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. On the Decision Trees page, select **New**.

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3. On the form, fill in the fields.

Decision Tree form

Field	Description
Name	The internal name of the decision tree.
Action Label	The label of the call-to-action button on the Recommended Actions card.
Description	The description of the decision tree to show on the Recommended Actions card.
Title	The external name of the decision tree that end-users or agents see in a workspace. If the **Title** field is empty, the internal name is shown as the external name on the Recommended Actions card.
Question font size	The font size of the questions in the guided decision tree. It reflects in the workspace and service portal. The font size defined in the parent decision tree is inherited by the child decision tree even though the Question font size for the child decision tree has its own Question font size defined. You may need to configure the form to add this field.
Show a dismiss button	Shows or hides the **Dismiss** button that cancels the flow of a decision tree. This field is turned on by default.

4. Select **Submit**.

Result

A decision tree record and a start node are created.

What to do next

Configure a start node to add initial set of questions or instructions to a decision tree in Decision Tree Builder.

Configuring decision trees in Decision Tree Builder

Configure decision trees using the no-code visual Decision Tree Builder, which provides a canvas for a diagrammatic representation of nodes and their paths in a troubleshooting process.

As a process owner or business analyst, you can configure decision tree by adding nodes, defining paths, and attaching guidances through Decision Tree Builder. For more information, see Decision tree nodes.

You can validate and activate a decision tree with a single action. For more information, see Activate a decision tree.

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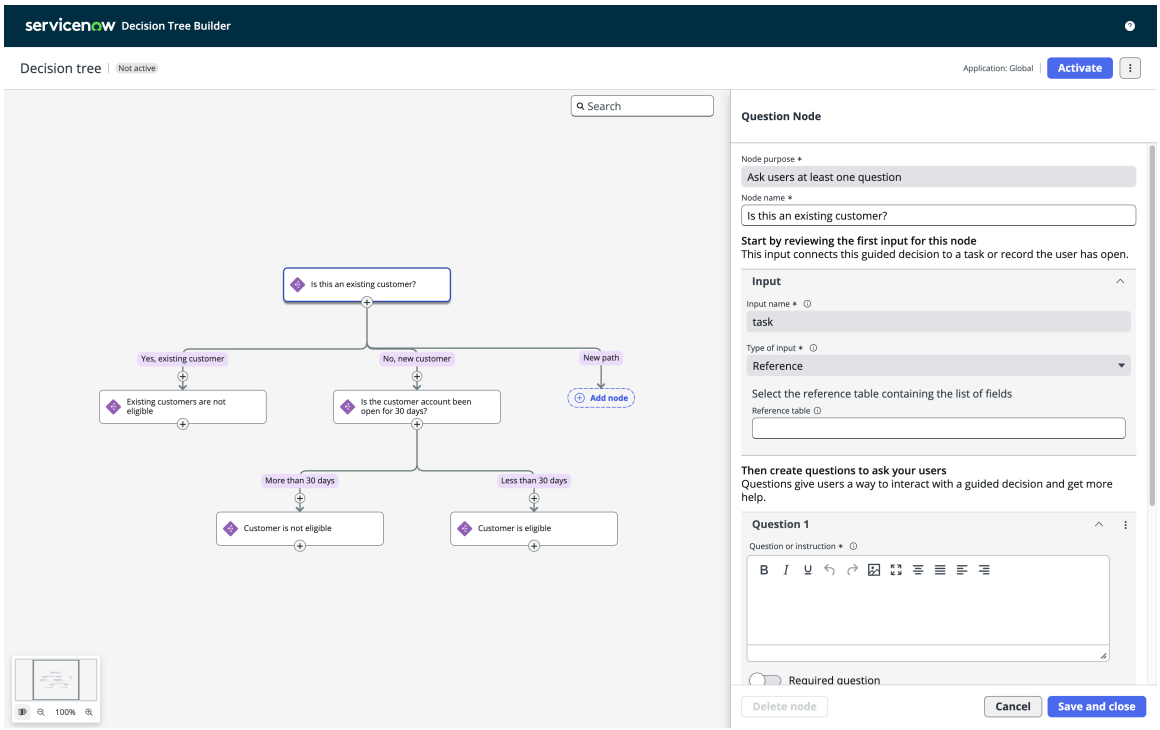
Decision Tree Builder canvas



Accessing Decision Tree Builder

You can access the Decision Tree Builder by selecting the **Open in Builder** button on the decision tree record.

Configuring question and guidance nodes

You can configure a new node as a question node or a guidance node. When there are multiple questions in a start node or a question node, you can delete a question or change the order of the questions. For more information, see Add questions or instructions to a decision tree.

Guidance nodes provide actions to agents to resolve or escalate a customer issue. You can either select a guidance from the list of available guidances or create a guidance in Core UI. You can then configure guidance inputs by entering static values or reuse inputs from prior nodes. For more information, see Provide actions to agents in a decision tree.

Linking node

You can configure a new node as a linking node to link a child decision tree to the current decision tree. This linking connects the execution of the primary decision tree to another decision tree when a specific condition is met. For more information, see Link an activated decision tree to this decision tree.

Creating paths for the next nodes

A path in a decision tree connects one node to another. You can configure a condition to define when the path must be taken. Selecting certain answers can be a condition for the path. The priority order for a path sets the precedence of one path over another.

For more information, see Determine the next node displayed in a decision tree.

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Editing a node or a path

When you edit the inputs of nodes and their paths, make sure to update the following nodes as well because they might be reusing data from these inputs.

Deleting a node or a path

Note the following information about deleting a node or path:

- You can delete a leaf node if it isn't connected to any path or a node.
- Deleting a leaf node removes the node from the decision tree but the configuration of the path before the deleted node remains intact.
- You can't delete an intermediate node or path.
- When you delete the question node after a guidance node, both the question node and the path are deleted.

Linking inputs

You can link inputs from one node to another to reuse input values from prior nodes. You can use linked inputs to create path conditions. For more information about input mapping in the question node or guidance node, see Linking inputs in decision tree nodes.

For more information, see Reuse answers at decision points.

Related topics

Validation error notifications in Decision Tree Builder

Activate a decision tree

Revert to the previous activated decision tree version

Add questions or instructions to a decision tree

Add questions you want to ask your customers or instructions you want to provide to them and configure answer types in a start node in Decision Tree Builder.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

The start node is the first node in a decision tree. It contains a task input and a minimum of one question or instruction. You can configure one or more questions to ask customers or instructions to provide to them.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select **New node**.
5. In the **Node name** field, enter a name for the start node.
6. **Optional:** In the **Reference table** field, select a table for the record type.

   (Optional) The table that you select for the task input does not necessarily have to be a task table. For example, you can select a case, incident, or interaction table for the record context to recommend this decision tree in a workspace.

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Note: You must select the same table as the reference table for the context record in Recommended Actions.

7. In the Question 1 section, enter a question or instruction for customers.
   You can add text formatting, images, or links using the controls at the top of the Question 1 section.
8. **Optional:** Make this question a required question by selecting the **Required question** field.
9. Select the type of answer for your question.

   For a description of the answer types, see Answer types for questions.

   The answer the customer provides to a question can be passed to other nodes and paths via input mapping.
10. **Optional:** Link inputs to reuse answers from prior nodes.
    For more information, see Reuse answers at decision points.
11. **Optional:** Add more questions or instructions.
12. Select **Save and close**.

What to do next

Determine the next node displayed in a decision tree

Answer types for questions

Several answer types are available for agents to provide answers to questions in a decision tree.

Type of answer

Choice	Description
Choice	A list of choices. The list types are: • **New list**: New choice list • **Pre-defined list from a table**: Existing choice list from a selected table **Use "None" as the first choice in the list**: Option to add **None** as the default value in the list.
Date	Date in the format of YYYY-MM-DD
Date/time	Date and time in the format of YYYY-MM-DD HH:MM:SS
Decimal	A number including decimal points.
Integer	A number that does not include decimal points.
Reference	Reference to a field from another table. When this answer type is selected, the following fields appear: • **Reference table**: Table for selecting a field from. • **Apply a filter**: Condition to filter the search results. For example, the Caller field on the Incident table is a reference to the User [sys_user] table.
String	A line of text. When this answer type is selected, the following field appears:

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Type of answer (continued)

Choice	Description
	Maximum number of characters: Length limit of the text string.
True/ False	Check box that enables the user to indicate whether the condition is true or false. If selected, it returns a value of true.

Determine the next node displayed in a decision tree

Configure a path in Decision Tree Builder to set the conditions for when the next question or a guidance is displayed in a decision tree.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

You can create two or more paths from any question node.

Because you can add a question node only after a guidance node, the path configuration isn't required.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select the Add path icon (⊕) on a node.
   A new path and a new node are added to the canvas.
5. Select the new path.
6. Enter a name for the path.
7. In the **Path priority** field, enter a priority order for this path.
   The path with the lowest priority order is executed first.
8. Configure one or more conditions by selecting a question from the previous node, an operator, and an input's value.
   For example, if the answer type is an integer, you can set a condition that when a value that a customer provides is more than the value you specify in the condition, this path must be taken.

   You can access the direct parent node's inputs only while configuring a condition for the path.
9. **Optional:** If there are multiple questions in a question node, select **New condition set** to define a complex condition for a combination of answers.
10. Select **Save and close**.

What to do next

Continue building your decision tree.

- Add a next set of questions. For more information, see Add a follow-up set of questions or instructions in a decision tree.
- Provide guidance to agents. For more information, see Provide actions to agents in a decision tree

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Add a follow-up set of questions or instructions in a decision tree

Configure a question node in Decision Tree Builder to add follow-up questions or instructions. Answer to these questions either lead to a guidance or a further set of questions.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, add a new node by selecting the Add path icon (⊕) on a node.
5. Select **Add node**.
6. In the pop-up window, select **Ask users at least one question** to configure a question node.
7. Enter a name for the node.
8. In the Question 1 section, enter a question or instruction for customers.
9. **Optional:** Make this question a required question by enabling the **Required question** field.
10. **Optional:** Enter more details related to your question or instruction in the **Additional details** field.
11. Select the type of answer.

    For a description of the answer types, see Answer types for questions.

    The answer the customer provides is passed to other nodes and paths via input mapping.
12. **Optional:** Link inputs to reuse answers from prior nodes.
    For more information, see Reuse answers at decision points.
13. **Optional:** Add more questions or instructions.
14. Select **Save and close**.

What to do next

Continue building your decision tree.

- Add a next set of questions. For more information, see Add a follow-up set of questions or instructions in a decision tree
- Provide guidance to agents. For more information, see Provide actions to agents in a decision tree

Provide actions to agents in a decision tree

Configure a guidance node in Decision Tree Builder so agents can view a recommendation on what to do next.

Before you begin

Verify that the guidances you want to use exist or create them. For more information, see Create a guidance in the Core UI.

Role required: admin, sn_gd_core.decision_tree_author

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About this task

Note: If the **Allow users to re-run the guidance** field is selected when creating a guidance, users can re-execute the guidance or go back and modify responses in the previous question nodes in the run-time experience.

You can link guidance inputs and outputs to the next question node.

You can select a guidance from the list of available guidances to link to your guidance node or create a new one in Core UI.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, add a new node by selecting the Add path icon (⊕) on a node.
5. Select **Add node**.
6. In the pop-up window, configure a guidance node by selecting **Propose a guidance as an outcome**.
   A guidance is an outcome of a decision tree.
7. Enter a name for the node.
8. In the **Guidance** field, select the guidance by starting to type the guidance name and selecting it from the list.
9. Enter specific values for guidance inputs in the **Set field inputs to pass data into this guidance** section.
   These fields can contain static text, dynamic content such as field values from guidance inputs, or a combination of static text and dynamic content. To use dynamic content, select the Link input icon (⚒) next to the field and select a guidance input from the list.
10. **Optional:** Enter placeholder values for guidance inputs in the **Set more field inputs to show to users** section.
    Agents can substitute their own information for the placeholder values. These fields can contain static text, dynamic content such as field values from guidance inputs, or a combination of static text and dynamic content. To use dynamic content, select the Link input icon (⚒) next to the field and select a guidance input from the list.
11. Select **Save and close**.

What to do next

Add a next node that is a question node after a guidance node.

Link an activated decision tree to this decision tree

Nest and invoke a decision tree from a linking node when specific conditions are met in Decision Tree Builder. Use nested trees to execute complex troubleshooting and reuse existing decision trees.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.

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3. Select **Open in Builder**.
4. In Decision Tree Builder, add a new node by selecting the Add path icon (⊕) on a node.
5. Select **Add node**.
6. In the pop-up window, select **Link decision tree** to configure a linking node.
7. Enter a name for the node.
8. In the **Child decision tree** field, select an activated decision tree.
9. Enter values or link inputs to reuse answers from prior nodes.
   For more information, see Reuse answers at decision points.
10. Select **Save and close**.

Reuse answers at decision points

Link inputs to reuse answers from prior nodes in Decision Tree Builder. For example, in a decision tree that deals with a loan application, you could reuse the input related to the customer's salary at multiple decision points to determine the loan eligibility.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

Linked inputs can be used to create path conditions.

For more information about input mapping and exceptions related to input mapping, see Linking inputs in decision tree nodes.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select the node you want to map inputs to.

Different nodes and actions

Node type	Action
Question node	**a.** Enter a question and select the type of answer. **b.** Select **Link inputs to reuse prior data**. **c.** Use the Link input icon (⇱) to select a prior node and an input that you want to reuse in this question. **Note:** The question with a reused answer is answered automatically during runtime.

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Node type	Action
Guidance node	**a.** Select a guidance from the list. **b.** Select the Link input icon ( ) to select a prior node and the input that you want to reuse in the guidance input.
Linking node	**a.** Select a child tree from the list. **b.** Select the Link input icon ( ) to select a prior node and the input that you want to reuse in the start node of the child tree.

5. Select **Save and close**.

Activate a decision tree

Activate a completed decision tree so you can use it in playbooks created using Playbooks, in recommendations created using Recommended Actions for Service, or in Service Portal.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

When you activate a decision tree, Decision Tree Builder checks for errors such as missing information, invalid input mappings due to changes in prior node inputs, or missing guidance inputs. After all the errors are resolved, you can activate the decision tree.

If you make changes to an activated decision tree, remember to activate the decision tree again to display the updated decision tree in a workspace. When a decision tree is activated to create a new version, the success message lists all playbooks and activities that reference the decision tree with direct links to facilitate version updates.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree that you want to activate.
3. Select **Open in Builder**.
4. In Decision Tree Builder, select **Activate**.
   - If there are errors in your decision tree, error icons and alert messages are displayed. You must resolve the errors before you can activate the decision tree. For more information, see Validation error notifications in Decision Tree Builder.
   - If there are no errors, the confirmation dialog box to activate the decision tree displays.
5. In the confirmation dialog box, select **Activate now**.
   A success message with instructions on the next action to take is displayed. If the decision tree is part of a Guided Decision with Inputs and Outputs activity in any playbooks, the success message displays the playbooks and their Guided Decision with Inputs and Outputs activities that use the decision tree. You must navigate to these playbooks and update the decision tree version to the latest version. Otherwise, these playbook activities continue using the older version until you update them to the latest version.

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Result

- The decision tree status changes from **Not active** to **Active**.
- The **Activate** button is disabled.

What to do next

- Configure recommended actions to use the activated decision tree as a recommendation. The recommendations appear as cards in the contextual side panel of a workspace. For more information, see Add Guided Decisions to Recommended Actions.
- Configure Playbooks to use the activated decision tree as part of a playbook in a record tab. For more information, see Add Guided Decisions to playbooks and Add Guided Decision with inputs/outputs to Playbook.
- Configure a Service Portal page to use the activated decision tree for providing troubleshooting process to internal users. For more information, see Add Guided Decisions to Service Portal.

Revert to the previous activated decision tree version

Discard any changes in a non-activated decision tree and revert the decision tree to the last activated version.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Open in Builder**.
4. Select the More options icon and select **Discard latest version**.

Result

The decision tree reverts to the last activated version.

Validation error notifications in Decision Tree Builder

Notifications of errors that you might encounter while building and activating a decision tree in Decision Tree Builder enable you to recover easily from errors.

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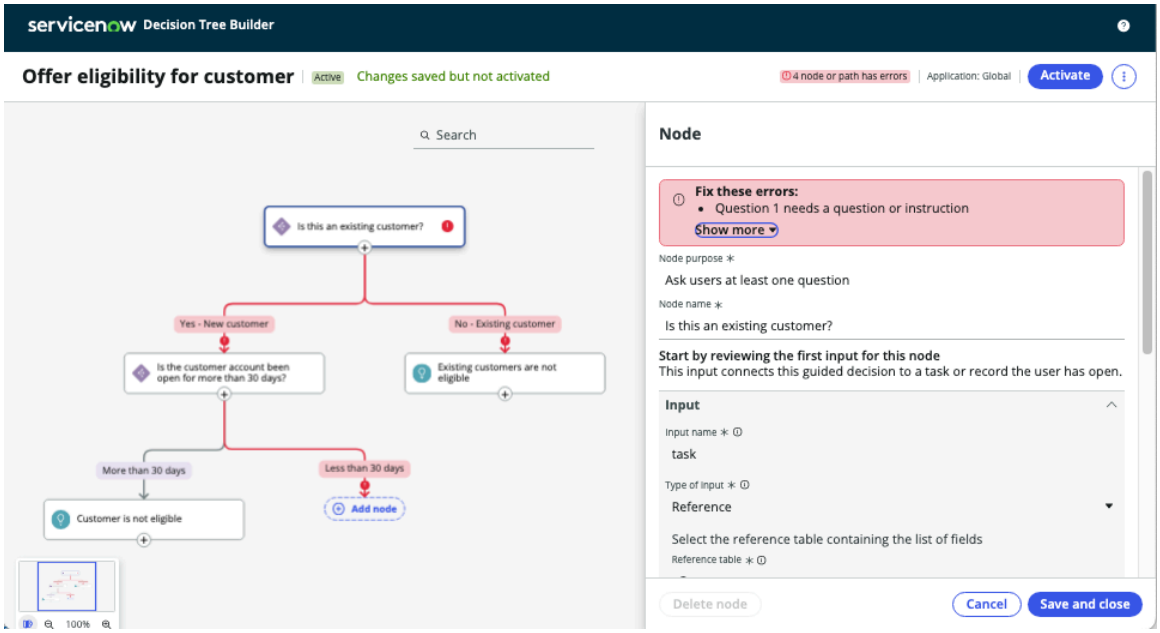

Error display

If there are missing values or incorrect configurations in a node or path, errors may appear during validation when saving or activating a decision tree.

The errors are indicated in the following ways:

- Error icons on nodes and paths that have errors
- A label for a count of nodes and paths that have errors in the top-right corner
- An alert message in the side panel showing a list of errors in the selected node or path

For more information on errors and recovery across various nodes and paths, see Validation errors.

Validation errors

Several types of errors are displayed for missing or incorrect information in the nodes and paths while saving an element or activating a decision tree.

Question node errors

Resolving errors in question nodes

Error message	Resolution
This node needs a unique name	Enter a name in the **Node name** field.
The questions in this node need to be unique	Enter a unique question or instruction in the **Question or instruction** field.
This node needs a question to ask users	Enter a unique question or instruction in the **Question or instruction** field.
The task input needs a reference table to pass data about records	Select a table in the **Reference table** field for the task input to pass data about the record on which this decision tree is run.

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Resolving errors in question nodes (continued)

Error message	Resolution
Question {number} needs a question or instruction	Enter a question or instruction in the **Question or instruction** field.
Question {number} needs an answer type	Select an input type for the expected answer in the **Type of answer** field.
Question {number} needs answer choices	The Choice answer type requires a choice list. Enter values in the **Label** and **Value** fields to configure a list. You can add as many choices as you want.
Question {number} needs an answer-string character limit	Enter a character limit in the **Maximum number of characters** field.
Type of answer in Question {number} doesn't exist	The answer type that you entered in the **Type of answer** field isn't valid. Select the answer type from the list. For more information, see Answer types for questions.
Question {number} needs a choice table and choice fields for the answer(s)	The **Pre-defined list from a table** option for the choice answer type requires you to specify the choice table and choice field to reuse choices. Select a table and list field in the **Choice table** and **Choice field** fields respectively.
Choice table in Question {number} doesn't exist	Enter a valid table name in the **Choice table** field.
Question {number} needs a reference table for the answer(s)	The reference input type requires a reference table to be selected. Select a table in the **Reference table** field to add a reference field, which stores a reference to a field on another table, as an answer type.
Reference table in Question {number} doesn't exist	Enter a valid table name in the **Reference table** field.
You need to add a path after this node	Question nodes require paths to add the next question or guidance nodes. Select the Add path icon ⊕ on the question node in the canvas to add a new path.
The input you linked in Question {number} isn't valid because of mismatched answer types. You can unlink this input, link a new one, or change this question's answer type.	After you change a question's answer type in a prior node, the input mapping from the question in the current node is no longer valid. **1.** Unlink the input by deleting the link. **2.** Either change this question's answer type to match the changed answer type in the prior node or add a question that matches it. **3.** Select the Link input icon ( ) to link the inputs.

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Resolving errors in question nodes (continued)

Error message	Resolution
The input you linked to Question {number} no longer exists after recent node changes. Unlink this input to fix this error.	Unlink the input by deleting the link.
The input you linked in Question {number} isn't valid because of mismatched reference tables with a prior node. Tables need to match at the same or child level.	You can link reference input types only if the current question node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table. **1.** Unlink the input by deleting the link. **2.** If necessary, select the reference table that matches at the same level or at the child level. **3.** Select the Link input icon ( ) to link the reference inputs again.

Guidance node errors

Resolving errors in guidance nodes

Error message	Resolution
This node needs a unique name	Enter a name in the **Node name** field.
This node needs a guidance	Guidance nodes must be linked to a guidance. Either select an existing guidance or create one. • Select an available guidance from the list in the **Guidance** field. • Create a guidance in Core UI by selecting the Create a guidance icon ⊕ in the **Guidance** field. For more information, see Create a guidance in the Core UI.
You need to set inputs for this guidance	Configure the guidance inputs for the guidance that you selected. For more information, see Provide actions to agents in a decision tree.
{Guidance input name} input isn't valid because of mismatched reference tables with a prior node. Tables need to match at the same or child level.	You can link reference input types only if the current guidance node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table.

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Resolving errors in guidance nodes (continued)

Error message	Resolution
	1. Unlink the input by deleting the link. **2.** Select the ( ) icon to link the inputs again or enter a static value.
The input you linked to {Guidance input name} no longer exists after recent node changes. Unlink this input to fix this error.	**1.** Unlink the input by deleting the link. **2.** Select the Link input icon ( ) to link the inputs again or enter a static value.
You need to reset the input(s) for this guidance because of changes in prior nodes	**1.** Unlink the input by deleting the link. **2.** If necessary, select the Link input icon ( ) to link the new answer type from the prior node or enter a static value.

Linking node errors and warnings

Resolving errors in linking nodes

Error message	Resolution
This node needs a unique name	Enter a name in the **Node name** field.
This node needs a child tree	Linking nodes must be linked to a child tree. Either select an activated decision tree or create one. • Select an activated decision tree from the list in the **Child decision tree** field. • Create a decision tree in Core UI by selecting the Create a decision tree icon ⊕ in the **Child decision tree** field. For more information, see Create a decision tree in Core UI.
You need to map the inputs of the child decision tree to this decision tree correctly.	Configure the start node inputs of the child decision tree or select the Link input icon ( ) to link the inputs.
{Input name} input isn't valid because of mismatched reference tables with a prior node. Tables need to match at the same or child level.	You can link reference input types only if the current guidance node's input table matches the prior node's input table at the same level or at the child level. For example, the Task table can be linked to the Task table or the Task table can be linked to the Case table, which is a child of the Task table.

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Resolving errors in linking nodes (continued)

Error message	Resolution
	1. Unlink the input by deleting the link. **2.** Select the ( ) icon to link the inputs again or enter a static value.

Resolving warnings in linking nodes

Warning message	Resolution
The child decision tree you linked earlier changed. Double-check the mapped inputs.	**1.** Unlink the input by deleting the link. **2.** If necessary, select the Link input icon ( ) to link the input from the prior node or enter a static value.
Make sure these linked decision trees can still use {child decision tree}: • {Name of parent tree 1} • {Name of parent tree 2} • {Name of parent tree 3}	When you update and activate a decision tree, the parent decision trees that use this decision tree as a child tree must also be updated. **1.** Select the parent decision tree. **2.** Select the link node that references the child decision tree that has changed. **3.** Unlink the input by deleting the link. **4.** If necessary, select the Link input icon ( ) to link the input from the prior node or enter a static value.

Path errors

Resolving errors in paths

Error message	Resolution
This path needs a name	Enter a name in the **Path name** field.
This path needs a unique path priority	Enter a unique value in the **Path priority** field.
This path needs conditions for showing the next node	Configure one or more conditions by selecting an input from the previous node, an operator, and an input value.
Every condition in this path needs to be complete	Complete a condition in the path by selecting an input from the previous node, an operator, and an input value.
You need to add a node after this path	A path must lead to a node. Select **Add node** to configure the placeholder node as a question node or a guidance node.

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Resolving errors in paths (continued)

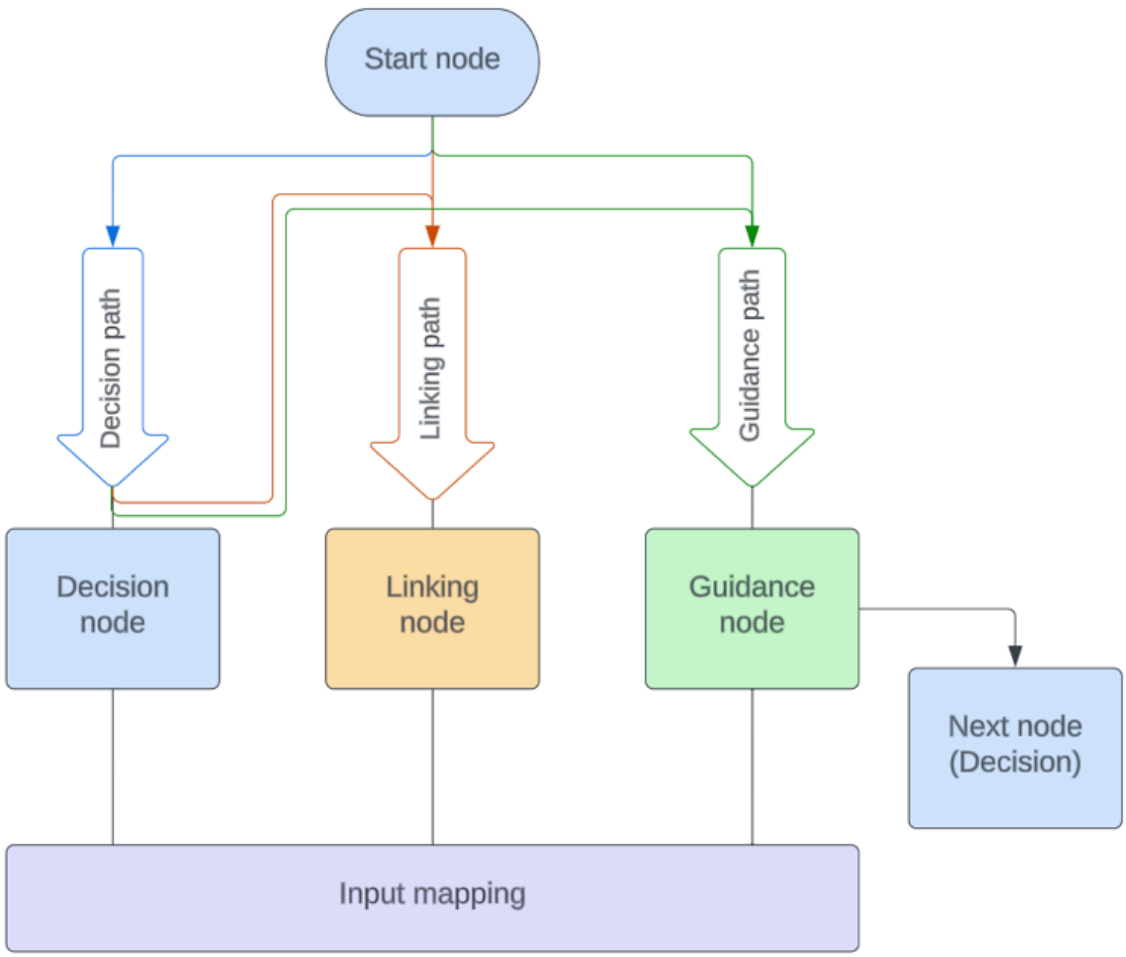
Error message	Resolution
The path condition needs new values because of changes in prior nodes	Reconfigure the path condition by selecting the new input from the previous node, an operator, and the new input value.
The path conditions can't be defined until the prior node has a question and answer	Configure questions and answer types in the path's parent node.

Editing decision trees in Core UI

You can edit decision trees created in Core UI to improve or extend a troubleshooting process.

Note: You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Decision tree configuration flow in Core UI



The following table provides high-level information for editing a decision tree in the Core UI.

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Decision tree configuration steps

Decision tree step	Description
Configure a start node and a task input	Each decision tree includes a start node of type decision and a task input. The task input stores a reference of the record that the agent is working on. For more information, see Edit a decision tree. Select the start node from the Decision Tree Nodes related list. Create inputs to add initial questions you want to ask customers. Select the input type for the expected answer and configure the answers in the related list. For more information, see Add questions or instructions to a decision input.
Create a decision path	Create a decision path and configure conditions for the next decision node. For example, you can set up a condition to select an answer for the question in the start node. When a user selects this answer, this path that leads to a decision node is taken. For more information, see Determine the next node in a decision tree. A decision node is automatically created.
Create inputs to add follow-up questions in the decision node	Select the input type for the expected answer and configure the answers in the related list. For more information, see Add questions or instructions to a decision input.
Create a guidance path	Create a guidance path and configure conditions for the next guidance node. For example, you can set up a condition to select an answer for the question in the start node or decision node. When a user selects that answer, this path leads to a guidance node. For more information, see Determine the next node in a decision tree. A guidance node is automatically created.
Configure the created guidance node	Configure the guidance node to provide resolution to a customer. Associate a guidance to the guidance node and configure the guidance inputs. For more information, see Provide actions to agents in a decision tree.
Create a linking path	Create a linking path and configure conditions for the next decision tree. For example, you can set up a condition to select an answer for the question in the decision node. When a user selects that answer, this path leads to the next decision tree. For more information, see Determine the next node in a decision tree.

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Decision tree configuration steps (continued)

Decision tree step	Description
	A linking node is automatically created.
Configure the created linking node	Configure the linking node to link another decision tree to this decision tree. For more information, see Link another decision tree to this decision tree.
Configure a next node	Configure a next node that is a decision node. **Note:** You can't add another guidance node after a guidance node. • You can add an intermediate decision node to add another guidance node. • You can configure a linking node after this decision node to link another decision tree. For more information, see Add a next node after a guidance node.
Map inputs from one node to another	Map inputs from one node to another to reuse answers by selecting a source node and a source input and a destination input. In the guidance node, you can pass inputs from the prior nodes to the guidance inputs by using the Pill-picker icon ( ) to reuse answers. For more information, see Reuse answers at decision points.

Note: To go back to your decision tree from any node, select the Preview this record icon (ⓘ) next to the **Decision Tree** field and then select **Open Record**. You can see all the nodes that you created in the related list.

Edit a decision tree

Edit a decision tree that you created using Core UI to improve or extend a troubleshooting process.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. On the form, edit the fields, as necessary.

Decision Tree form

Field	Description
Name	The internal name of the decision tree. **Note:** A start node is created for the decision tree with this name.
Action Label	The label of the call-to-action button on the Recommended Actions card.
Description	The description of the decision tree to show on the Recommended Actions card.
Start Node	The reference of the start node.
Title	The external name of the decision tree that end-users or agents can see in a workspace. If the **Title** field is empty, the internal name is shown as the external name on the Recommended Actions card.
Show a dismiss button	Shows or hides the **Dismiss** button that cancels the flow of a decision tree. This field is turned on by default.

4. Select **Update**.

Result

What to do next

Add questions or instructions to a decision input

Add questions or instructions to a decision input

Create decision inputs for each decision node. Decision inputs appear in the form of questions in a workspace for service agents to answer.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Create a decision path first. A decision node is automatically created with the same name as the decision path.

About this task

Decision nodes can have one or multiple questions with different answer types.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the start node or any decision node.
4. Select **Create Input**.
5. In the **Type** field, select the type of a decision input.

> **Note:** In the **Type** field, you have access to many input types. Select only one of the recommended input types listed the following table.

Input type

Field	Description
Choice	A list of choices **Choice list specification**: Type of choice list. You can create a choice list by clicking **New** in the Choices related list.
Date	Date in the format of YYYY-MM-DD
Date/time	Date and time in the format of YYYY-MM-DD HH:MM:SS
Decimal	A number with the decimal points
Integer	A number with no decimal points
Reference	Reference to a field from another table ○ **Reference**: Reference table for selecting a field. ○ **Reference qual condition**: Condition to filter the search results. For example, the Caller field on the Incident table is a reference to the User [sys_user] table.
String	A line of text **Maximum number of characters**: Option to specify the length of the string
True/ False	A check box field

6. In the **Label** field, enter a question or instruction for customers.
7. Select **Submit**.

What to do next

Determine the next node in a decision tree

Determine the next node in a decision tree

Create a path to set conditions and priority order for the next node in a decision tree.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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About this task

Based on the answer a service agent provides to a question, a decision path guides the agent to the next decision node, a guidance path guides the agent to the next guidance node, and a linking path guides the agent to the next linking node.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the start node or decision node.
4. Select one of the following actions.

Action	Description
Create Decision Path	Creates a decision path to link this node to the next decision node. The decision node is automatically created.
Create Guidance Path	Creates a guidance path to link this node to the next guidance node. The guidance node is automatically created.
Create Linking Path	Creates a decision path to link this node to the next linking node. The linking node is auto matically created.

5. In the **Label** field, enter a label for the path.
6. In the **Order** field, enter a priority order for this path.
   The path with the lowest priority order is executed first.
7. Configure a condition for this path to display the next node.

Path types and descriptions

Path	Description
Decision path	Decision paths include conditions when the next question is displayed to an agent.
Guidance path	Guidance paths include conditions when a guidance that provides resolution for an issue is displayed to an agent.
Linking path	Linking paths include conditions when a next decision tree is executed.

You can only access the direct parent node's inputs while configuring a condition for the path.

8. Select **Update**.

Note: You can create as many decision, guidance, or linking paths as required.

What to do next

Continue building the decision tree.

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- Add questions or instructions to a decision input
- Provide actions to agents in a decision tree
- Link another decision tree to this decision tree

Provide actions to agents in a decision tree

Associate a guidance to a guidance node so that service agents can act to resolve or escalate a customer issue.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Create a guidance path first. A guidance node is automatically created with the same name as the guidance path.

About this task

A guidance is an outcome of a decision tree.

You can either create a guidance or select a guidance from a list. For a complete list of guidances that are available by default, see Components installed with Guided Decisions Experience. You can then enter guidance inputs, as required.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the guidance node created.
4. In the **Guidance** field, select a guidance to associate with the guidance node.
5. Depending on the guidance you selected, enter guidance inputs, as required.

   Note: If you selected the Attach Knowledge Article guidance, enter the knowledge article to link to.

   If you selected the Provide Resolution guidance, enter the case, resolution notes, and a resolution code.

   If you selected the Create Work Order guidance, enter the task to link to.

6. Select **Update**.

What to do next

Link task input in the start node to the guidance

Link task input in the start node to the guidance

Link the task input in the start node to the task input in the guidance to pass record information.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

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About this task

The task input in the start node holds a reference of the record that an agent is working on in a workspace. For example, if you want to attach a KB article to a case, you would need the case number.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the guidance node created.
4. Select **Create Input Mapping**.
5. In the **Source Node** field, select the start node of your decision tree.
6. In the **Source Input** field, select the task input.
7. In the **Destination Input** field, select the task input associated with the guidance.

   Note: The **Destination Node** is automatically filled with the value of the decision node that you're creating the input mapping from.

8. Select **Submit**.

Link another decision tree to this decision tree

Nest and invoke decision trees from linking nodes when specific conditions are met. Use guidance output and nested trees to execute complex troubleshooting.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Create a linking path first. A linking node is automatically created with the same name as the linking path.

About this task

The execution of the linked decision tree begins when a specific condition specified in the linking path is met. The linking node holds a reference of the start node in the next decision tree.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the linking node.
4. In the **Linked Decision Tree** field, select an available decision tree from the list.
5. Select **Update**.

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Add a next node after a guidance node

Add a next node that is a decision node after a guidance node. If a next node is configured, the execution of the decision tree continues after the agent performs the guidance and the guidance history is marked as complete.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

You can only add a decision node after a guidance node.

- You can add an intermediate decision node to add another guidance node.
- You can configure a linking node after this decision node to link another decision tree.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select the guidance node.
4. Select **Set Next Node**.
5. In the **Label** field, enter a name for the next decision node.
6. Select **Update**.

What to do next

Continue building the decision tree.

- Add questions or instructions to a decision input
- Determine the next node in a decision tree

Reuse answers at decision points

Create input mapping to reuse answers from prior nodes. For example, in a decision tree that deals with loan application, you can reuse the input related to the customer's salary at multiple decision points to determine the loan eligibility.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

About this task

For more information about input mapping in a decision node or a guidance node, see Linking inputs in decision tree nodes.

Mapped inputs can be used to create path conditions.

You can edit or extend existing decision trees in the Core UI but you can no longer create them. Use Decision Tree Builder to create new decision trees. For more information, see Configuring decision trees in Decision Tree Builder.

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Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision node or the guidance node that must reuse inputs.
3. Click **Create Input Mapping**.
4. In the **Source Node** field, select the node you want to copy from.
5. In the **Source Input** field, select the node input to copy.
6. In the **Destination Input** field, select the node input you want to copy the values to.

   Note: The **Destination Node** is automatically filled with the value of the node that you're creating the input mapping for.

7. Select **Submit**.

Delete a decision tree

Delete a decision tree and all the related version records. All related records such as decision tree versions, nodes, and paths are deleted.

Before you begin

Role required: admin, sn_gd_core.decision_tree_author

Procedure

1. Navigate to **All** > **Guided Decisions** > **Decision Trees**.
2. Select the decision tree from the list.
3. Select **Delete**.

Add Guided Decisions to Recommended Actions

Add decision trees created using the Guided Decisions Experience application to Recommended Actions, so customer service agents can work through it to resolve cases more efficiently.

Before you begin

Verify that you have Recommended Actions application (sn_nb_action) installed.

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Create a context for a table.
   A context enables agents to see recommended actions for a record in that table.
3. Create a rule for the context.
   A rule is a set of conditions that applies to a context and determines when a recommended action appears for records in the context table.
4. Create a recommendation of type decision tree.
   A recommendation is a way to suggest an action to an agent.

Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

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Add Guided Decisions to playbooks

Add decision trees created using the Guided Decisions Experience application to a playbook, so customer service agents can work through it to resolve cases more efficiently.

Before you begin

Role required: admin, pd_content_author

About this task

A playbook is set of steps that defines a process. A decision tree can be added as one of the steps within a playbook.

Playbooks are displayed in cases on Agent Workspace based on trigger definitions defined for each playbook in the Process Automation Designer. For more details, see Process Automation Designer. Based on the context of the case the customer service agent is working on, the playbook and any associated decision trees are displayed.

For more details on playbooks for Customer Service Management, see Playbooks for Customer Service Management.

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
   Playbooks opens in a new tab.
2. Select the process you want to add the decision tree to.
3. Select **Add activity**.
4. Select **Guided Decisions Experience** > **Guided Decisions**.
5. In the Details tab, fill in the basic details of your activity.

Option	Description
Label	Unique name for your activity. This name ap pears in user-facing views of your playbook.
Description	Description of your activity.
Run condition	After the activity starts, the activity runs only if specific conditions are met.
When to start	Options when your activity must start: ○ **After Previous**: This activity starts when the preceding activity has a state of Skipped or Complete. ○ **Immediately**: This activity starts when its stage starts running. Your activity doesn't depend on the state of any preceding activi ties. ○ **With Previous**: This activity starts when the immediately preceding activity starts run ning.

6. Select **View all properties**.
7. In the Automation tab, in the **Decision tree** field, select the decision tree you want to add to the guided decision.
8. Select **Done**.

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9. In the main header, select **Activate**.
   Activating your process publishes it so that it runs when triggered.

Result
The decision tree is added to the playbook. Depending on the context of the case, customer service agents can access the decision trees from cases on Agent Workspace.

Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

Add Guided Decision with inputs/outputs to Playbook

Add decision trees created using the Guided Decision with Inputs and Outputs activity in the Guided Decisions Experience application to a playbook, so customer service agents can work through it to resolve cases more efficiently.

Before you begin
Role required: admin, pd_content_author

About this task
The Guided Decision with Inputs and Outputs activity is a playbook activity that enables decision trees to be used in playbooks with the ability to pass input parameters and retrieve output values. This activity allows you to select a specific decision tree version and configure input parameters that map to the questions defined in the first node of the decision tree. The activity supports versioning, where each activation of the decision tree builder creates a new version, and playbook activities continue using their configured version until manually updated. When a decision tree is activated to create a new version, you receive a notification message listing all playbooks and activities that reference the decision tree, with direct links to facilitate version updates.

For more details on playbooks for Customer Service Management, see Playbooks for Customer Service Management.

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Designer**.
   Playbooks opens in a new tab.
2. Select the process you want to add the decision tree to.
3. Select **Add activity**.
4. Select **Guided Decisions Experience** > **Guided Decisions with inputs/outputs**.
5. In the Details tab, fill in the details of the activity and select **Save and close**.

Details tab in the Guided Decisions with Inputs/Outputs activity

Field	Description
Label	Unique name for your activity. This name appears in user-facing views of the playbook.
Description	Brief description of the activity.
Activity definition	
Schedule	

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Field	Description
Start rule	Defines when to start the process the activity. Select one of the following: ○ When stage starts: Your stage starts running as soon as the playbook starts. ○ After specific activities: Your stage starts running after specified stage(s) have finished running. Starts after
Display order	When there are multiple stages running at the same time, define the order in which stages appear during a playbook run. **Note:** In Workflow Studio, this can also be helpful when viewing parallel activities in Diagram view.
Start with delay	Waits for a certain duration before running the activity when the start rule is met. For more information, see Start with delay input properties.
Restart rules	Defines how the activity runs when the playbook is restarted. ○ Skip on restart ○ Run always ○ Skip on first run

6. In the Automation tab, fill in the following fields and select **Save and close** button.

Automation tab in the Guided Decision with inputs/outputs activity

Field	Description
Automation	See or open the action, subflow, or flow that drives the activity.
Inputs	Configure inputs for the action, subflow, or flow that is driving the activity. Not all activities require user input. Define the values of the activity's inputs.
Inputs	
Decision tree	Decision tree as one of the steps within a playbook.
Decision tree version	Active version of the decision tree.

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Field	Description
	Note: The activity supports versioning, where each activation of the decision tree builder creates a new version, and playbook activities continue using their configured version until manually updated.
Outputs	Outputs of the action, subflow, or flow that is driving the activity.

Note: The activity provides a refresh capability that allows you to update to the latest decision tree version while preserving existing input mappings and adding any new input fields that were introduced in the newer version.

7. In the UI Layout tab for knowledge articles, fill in the following fields and select **Save and control**.

UI Layout tab in the Guided Decision with inputs/outputs activity

Field	Description
Article height	Default height of the article.
Collapse knowledge article	When selected, the article appears collapsed in the playbook.

8. In the main header, select **Activate**.
   Activating your process publishes it so that it runs when triggered.

Result

The decision tree is added to the playbook. Depending on the context of the case, customer service agents can access the decision trees from cases on Agent Workspace. An agent can restart this activity by selecting the **Restart Activity** option in a playbook. For more information on how to restart an activity, see Restart a playbook.

Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

Add Guided Decisions to Service Portal

Create or edit a page to add decision trees to Service Portal so internal users can troubleshoot their issues.

Before you begin

The decision tree that you want to add to the Service Portal page must exist. For more information, see Configuring decision trees in Decision Tree Builder.

Role required: sp_admin or admin

About this task

These steps are intended for users with little to no coding experience.

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Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. From the Service Portal Designer, either select an existing page or add a new page.

Option	Action
Use an existing page	Select the page.
Add a page	**a.** Select **Add a new Page**. **b.** Provide the page title and ID. **c.** Select **Submit**

4. Under Layouts, create the area to add widgets by selecting **Container** and dragging it onto the page.
5. In the **Widgets** tab, in the **Filter Widget** field, search for the Decision tree - Visualiser widget, then drag the widget to the layout.
6. Select the Edit icon ( ).
7. Provide the decision tree ID.
   a. On the decision tree record, select the Additional actions icon ( ).
   b. Select **Copy sys_id** from the menu.
8. Select **Save**.

What to do next

If you want the decision tree theme to match the Service Portal, you can apply a UX theme to change your existing theme. For more information, see Match the theme of the decision tree component with the Service Portal page.

Related topics

Configuring Guided Decisions

Configuring guidances and decision trees

Match the theme of the decision tree component with the Service Portal page

Customize the theme of the decision tree component to match the Service Portal theme.

Before you begin

A variant UX theme to match the theme of the decision tree component with the Service Portal theme must exist. For more information, see Manage the visual style of UI Builder experiences.

Role required: sp_admin or admin

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. In the **Search** field, enter `ux_portal_theme_to_uib_theme_mapping` and select the record.
3. Copy the value of the **Name** field from the ux_portal_theme_to_uib_theme_mapping record.

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The **Name** field contains the system property name appended with the existing portal theme ID, for example, `ux_portal_theme_to_uib_theme_mapping.f548bd34845a1110f87767389929c667`.

4. Select **New** to create a system property.
5. In the **Suffix** field, paste the copied value.
6. Provide the UX theme ID of the theme that you want to apply in the **Value** field.
   a. On the UX theme record, select the Additional actions icon ( ).
   b. Select **Copy sys_id** from the menu.
7. Select **Update**.

Result

The Service Portal theme is applied to the decision tree component.

Playbooks in Customer Service Management

Playbooks provide customer service agents with step-by-step guidance for resolving specific types of cases. Agents can follow a playbook in CRM Workspace and complete guided activities to resolve customer issues.

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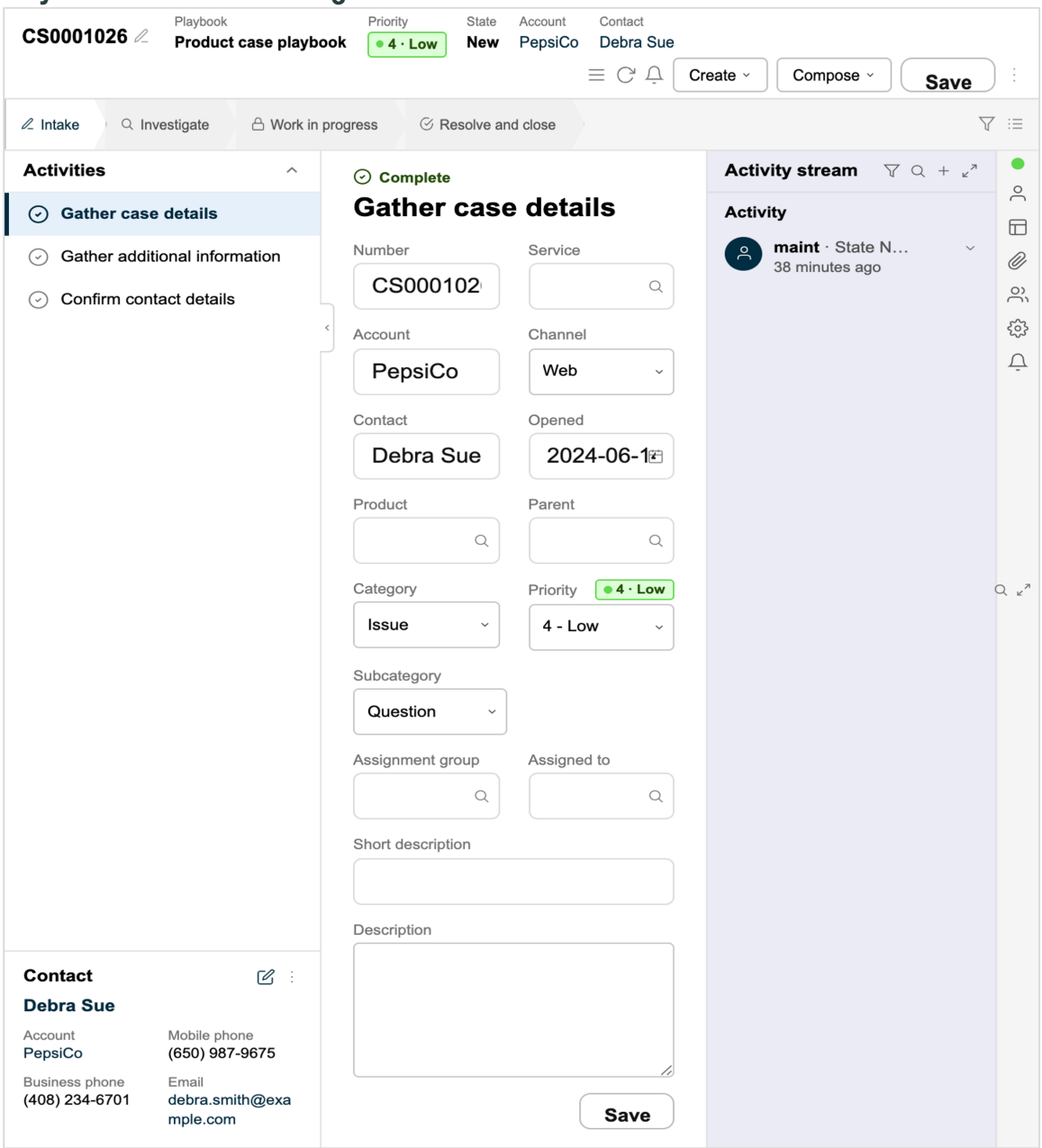
Playbook with horizontal stages



Playbook overview

A playbook is an end-to-end workflow that includes the stages, steps, and guidance to lead users through a business process. A playbook visualizes a workflow in a task-oriented view and guides users through sequences of tasks.

A playbook takes a workflow and breaks it into multiple stages. Each stage in a playbook includes a logical group of sequential activities for an agent to complete. Stages can also include automated activities, such as sending an email to a customer when a stage or activity is complete.

Playbooks include:

- A series of steps that a user must complete in order to achieve a particular goal and the necessary guidance for completing those steps.
- One or more stages, or groups of tasks, and sequences of activities within each stage.

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Playbooks are created in the Workflow Studio application. Pages that display playbooks in a workspace are created in the UI Builder application. Agents use playbooks in CRM Workspace to complete activities. End users can also use playbooks from service portals to create requests and provide information. For more information, see the following sections in this topic:

- Playbook users and tools
- Configuring and configuring playbooks

Playbook users and tools

The following table describes the different user roles that are involved in the creation, configuration, and use of playbooks. It also describes the tools and applications used by each of those roles.

Playbook user roles and tools

User role	Tool / application
Playbook admin [playbook.admin]	Uses the Workflow Studio application to author, configure, and monitor playbooks. Workflow Studio is the design environment where playbook owners build playbooks.
Playbook experience admin [playbook_experience.admin]	Uses the Running Playbook Experience application to create playbook experience records. These records define how playbook activities appear within a playbook.
UI Builder admin [ui_builder_admin]	Uses the UI Builder application to create or customize pages that display playbooks in CRM Workspace. UI Builder is a web user interface builder. Users with the UI Builder admin role use the tool to create pages, which are collections of components that make up a workspace user interface. **Note:** Playbook page templates are available for UI Builder admins to use as a starting point for creating playbook pages.
Customer service agent [sn_customerservice_agent]	Uses playbooks in CRM Workspace to complete activities and resolve cases. The playbook runtime experience is where end users, such as agents, follow the playbook to complete a business process.
End user [sn_customerservice.customer]	Uses playbooks create cases, provide requested information, and complete assigned tasks. For more information, see Playbooks for portals.

Creating and configuring playbooks

Creating and configuring a playbook involves different tools and applications. Playbooks are created using the Workflow Studio application. Some of the configuration for a playbook is performed in UI Builder as part of the playbook component configuration. Additional settings can be configured in the playbook experience record in the Core UI. These settings include

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selecting the playbook activity view and configuring playbook stage and activity visibility. For more information, see Configure Playbooks for Customer Service Management.

Configuration tasks and tools

Tools	Tasks
Workflow Studio	Workflow Studio is the design environment where playbook owners (users with the playbook.admin role) build playbooks. For more information, see the following topics: • Exploring Workflow Studio • Getting started with Playbooks
Running Playbook Experience	Playbook experience records define how playbook activities appear within a playbook. • Users with the playbook_experience.admin role can create playbook experience records. • Users with the ui_builder_admin role can select a playbook experience when adding a playbook to a page in UI Builder. The playbook experience record includes settings for the playbook stage and activity visibility, such as hiding or displaying playbook activities based on user role or activity state.
UI Builder	Users with the ui_builder_admin role can use UI Builder to create or customize pages, which are collections of components that make up a workspace user interface. Some of the playbook configuration tasks in UI Builder include: • **Selecting a playbook activity view**: The activity view determines how the stages and activities are displayed in the playbook. Select a playbook activity view in the playbook component configuration in UI Builder. • **Selecting a playbook experience**: The playbook experience determines how the system renders a playbook in a workspace. You can use playbook experiences to customize the look and feel of a playbook, map user actions, and override activities. Select a playbook experience when adding a playbook to a page in UI Builder. • **Configuring a playbook to use compact mode**: Compact mode moves the playbook to the contextual side panel. Agents can complete playbook activities in the side panel while viewing other information in the record page. Configure a playbook to use compact mode in the playbook component configuration in UI Builder.

Using playbooks

Customer service agents can use the guidance available with playbooks to complete the tasks and activities that are needed to resolve specific types of cases.

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A playbook includes multiple stages and each stage includes one or more activities for an agent to complete. When using a playbook, agents can:

- View the stages and activities.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to resolve the case.

For more information, see Using Playbooks for Customer Service Management.

Playbook applications

Several applications are available that enable you to create and use playbooks with Customer Service Management. See Playbook plugins for detailed plugin and dependency information.

Customer Service Management playbook applications

Application	Description
Playbooks for Customer Service Management	Use this application to create or customize playbooks based on your individual business needs. Create playbooks that support case types or the base customer service case.
Case Playbook for Onboarding	Use this application to manage the process for taking on new customers or enrolling customers in new products. An onboarding case captures the details of the new customer, including their selection of products and services.
Case Playbook for Complaints	Use this application to manage the process for handling customer complaints. A complaint case captures the details of the problem reported by the customer and the expected resolution.
Case Playbook for Product Support	Use this application to guide agents through the steps that are needed to resolve product issues. A product support case captures information about the customer, the product, and the reported issue.

Playbook plugins

The Playbooks for Customer Service Management plugin (sn_csm_playbook) is available from the ServiceNow Store. This plugin requires the following plugins:

- Case Management Core (com.sn_customerservice)
- Dynamic Related Records (com.snc.uib.sn_dyn_rel_rec)
- Playbook Experience (com.playbook_experience)

The following playbook applications are available for use with Customer Service Management and are available from the ServiceNow Store:

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- Case Playbook for Onboarding
- Case Playbook for Complaints
- Case Playbook for Product Support

These playbooks require the following plugins:

- Playbooks for Customer Service Management (com.sn_csm_playbook)
- Customer Service Case Types (com.snc.csm_case_types)

Request apps 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.

Related topics

Interact with Playbook

Configure Playbooks for Customer Service Management

Using Playbooks for Customer Service Management

Playbook layout and features

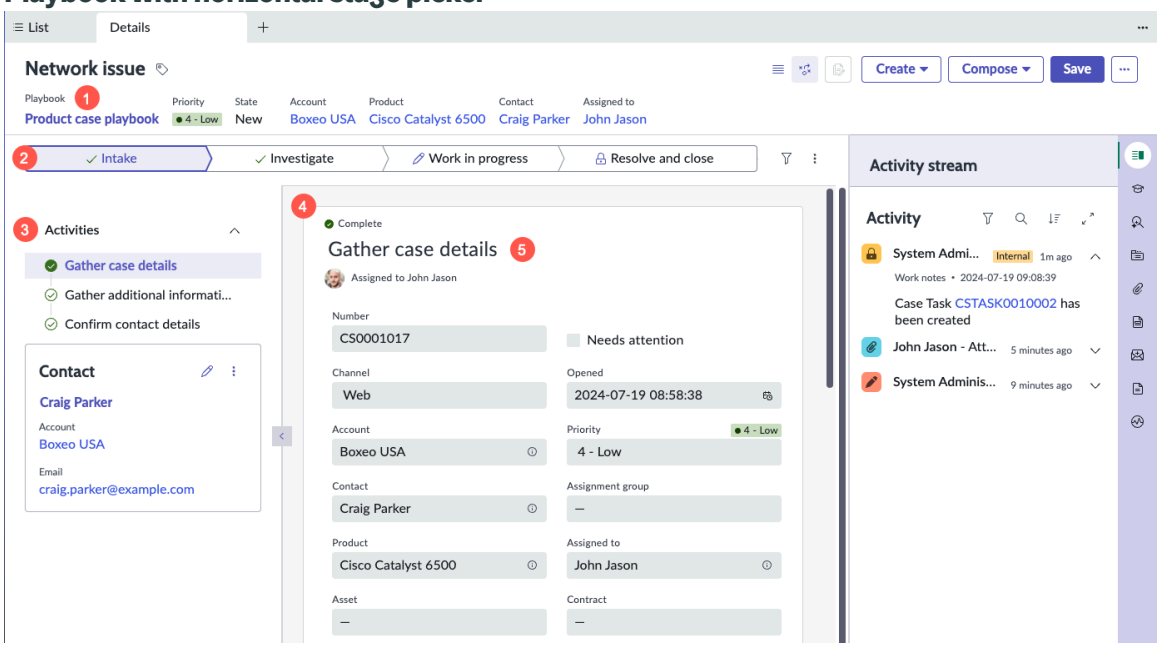
A playbook includes several features that agents use to complete activities and resolve cases, including the playbook stage picker, activity picker, and activity viewer. Record pages created in UI Builder determine how these playbook features are displayed in CRM Workspace.

UI Builder page templates and record pages that include horizontally and vertically oriented playbooks are available with the Playbooks for Customer Service Management application [com.sn_csm_playbook].

For more information about using these record pages, see the following topics:

- Case playbook: horizontal stages record page
- Case playbook: vertical stages record page

Playbook with horizontal stage picker



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Playbook layout and features

Callout	Playbook feature	Description
1	Playbook name	The name of the playbook appears in the page header.
2	Stage picker	Playbooks include either a horizontal or vertical stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. • The horizontal stage picker displays the playbook stages across the top of the record page below the page header. Select a stage to see the activities in the activity picker. • The vertical stage picker displays the playbook stages and activities on the side of the record page. Select a stage to expand the stage and display the included activities.
3	Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the horizontal stage picker, you can expand or collapse the list of activities for the current stage. With the vertical stage picker, you can expand each stage to see the activities within that stage. Selecting an activity displays the details in the activity viewer.
4	Activity viewer	The activity viewer displays the selected activity. This is the main work area where an agent performs the work necessary to complete the current activity.
5	Activity cards	Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards to complete the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.

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Playbook activity view

The activity view determines how the stages and activities are displayed in the playbook.

- **Focused**: Displays the stages and activities in the playbook lifecycle panel and the current activity in the playbook work area.
- **Stacked**: Displays the stages in the playbook lifecycle panel and cards for each of the activities in the current stage in the playbook work area.

The system administrator can configure the playbook activity view in UI Builder. For more information, see Select a playbook activity view.

Playbook stages

Playbooks contain one or more stages and stages contain one or more activities. The current stage in a playbook is highlighted and the activities in that stage appear in the activity picker.

The stages in the stage picker include icons that indicate the stage status:

- A check mark indicates that the stage is complete.
- A pen icon indicates the current stage.

- A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.

There are two versions of stage picker: horizontal and vertical.

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- The horizontal stage picker displays across the top of the UI and shows persistent information in the left panel. With the horizontal stage picker, you can expand or collapse the list of activities for the current stage.
- The vertical stage picker displays in the left panel. With the vertical stage picker, you can expand each stage to see the activities within that stage.

Playbook activities

Activities are the individual tasks that an agent needs to complete in order to complete a playbook stage. The activity picker displays the activities for the current playbook stage. Each activity in the activity picker has an indicator that shows the activity state:

- Complete ( )
- In Progress ( )
- Pending ( )
- Skipped

Selecting an activity displays the details of that activity in the activity viewer.

Navigating playbook stages and activities

Agents can use the stage picker and activity picker to navigate between stages and activities as assigned roles or activity security configurations permit. For example, activities such as case tasks can be assigned to different users. A user with the case task agent role can only see the case tasks that are assigned to them.

When an agent opens a record that uses a playbook, it opens to the current stage and highlights the current activity. For stages with multiple activities, the current activity is the first available activity. An available activity is an activity that has a state other than Complete.

When an agent selects an available activity, it becomes the current activity. An agent can navigate stages and activities in any order as long as there is at least one available activity to select.

Note: The playbook configuration determines the visibility and accessibility of pending stages and activities. For more information, see Configure playbook stage and activity visibility.

Using keyboard navigation in a playbook

Use the following keyboard keys to navigate playbook stages and activities.

- **Tab** key: Use the **Tab** key to initiate navigation and move between stages, activities, and the playbook work area.
- **Arrow** keys: Use the left, right, up, and down arrow keys to navigate the fields on a playbook activity card.
- **Enter** key: Press the **Enter** key to select buttons on a playbook activity card.

Filtering playbook activities

Agents can filter playbook activities and see those activities that match the filter conditions.

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- To filter playbook activities, select the filter icon ( ) and select one or more of the following states:
  - Complete
  - In Progress
  - Pending
  - Skipped
- To clear the filter, select the filter icon again and remove the selections.

Configuring stage and activity visibility

Users with the admin role can configure the visibility of playbook stages and activities, including:

- Showing or hiding stages and activities that are pending.
- Showing or hiding stages and activities where a user does not have access.

The administrator configures these settings in the Playbook Experience record. For more information, see Configure playbook stage and activity visibility.

Playbook capabilities

The capabilities provided by playbooks enable agents to quickly resolve customer issues. These capabilities work together to provide agents with a better overall experience when using playbooks to resolve customer issues.

Playbook capabilities

Capability	Description
Create a record using a playbook	Customer service agents can create a record using a playbook instead of a record form. Creating a record using a playbook opens the playbook and initiates the first activity. The agent completes this activity as part of the record creation. For example, an agent can create a case and gather the necessary information about the customer and the issue as the first activity in the playbook. For more information about configuring this feature, see Playbook record generator.
See the entire end-to-end workflow using the stage picker and activity picker	The stage picker and activity picker enable agents to see the following information: • The end-to-end workflow. • The stages in the playbook. • The activities in the current stage. • Stage and activity progress indicators. • Details of the current activity displayed in the activity viewer.
Use the contextual side panel to view additional information	Playbooks can display the following information in the contextual side panel:

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Playbook capabilities (continued)

Capability	Description
	• Activity stream • Ribbon information such as the case overview, customer details, timeline, and SLAs • Dynamic related records (see below for more information) • Related Items tab For more information, see: • Using the activity stream in the contextual side panel • Viewing ribbon information in the contextual side panel • Viewing related records in the contextual side panel • Related Items • Administering Activity stream for Configurable Workspace
Use the contextual side panel to display dynamic related records	Display records in the contextual side panel that dynamically change based on the context of the current record or playbook activity. For more information, see Dynamic related records.
Use a playbook in compact mode	Compact mode displays the playbook in the contextual side panel. Agents can complete playbook activities in the contextual side panel while viewing other information on the record page.
View the SLA widget on playbook activity cards	Activity cards in the playbook activity viewer can display an SLA widget in the upper right corner. The widget appears on the activity card when the playbook activity has an SLA. This includes activities in the following stages: • Triage • Research • Respond The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75% • Orange: 75–99% • Red: 100% or breached

Playbook terminology

Use the following list of terms to gain an understanding of playbook structure, tools, and configuration.

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A playbook is an end-to-end workflow that includes the steps, strategies, and guidance to lead users through a business process. A playbook:

- VISUALIZES a workflow in a task-oriented view and guides users through sequences of tasks.
- INCLUDES a series of steps that a user must complete to achieve a particular goal.
- PROVIDES guidance for completing those steps.

Playbook structure

A playbook contains one or more stages, or groups of tasks, and sequences of activities within each stage. A playbook also includes a trigger. The structure of a playbook is created in Workflow Studio.

Playbook structure

Term	Definition
Trigger	A trigger determines when a playbook starts running. Each trigger has a type and conditions that, when met, start running an activated playbook. The trigger type represent a record operation, such as when a record is created or updated. Trigger conditions determine when and how a trigger is fired. Triggers are created in Workflow Studio.
Stage	A stage is a sequence of activities in a playbook that are grouped in a logical way. A playbook can contain one or more stages and each stage includes one or more activities for a user to complete. Stages can also include automated activities. Stages are added to a playbook in Workflow Studio.
Activity	An activity is one step in the overall business process represented in a playbook. Activities are the tasks, steps, or actions that a user takes to complete a playbook. Activities are grouped in stages and are sequenced in a logical order. Users can complete or skip manual activities. Activities can also be completed automatically. Activities are added to playbook stages in Workflow Studio.

Playbook UI components

Customer service agents interact with playbooks in CRM Workspace. The record pages that display playbooks in a workspace are created or customized in UI Builder. Different components make up the playbook record pages.

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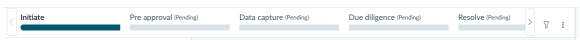
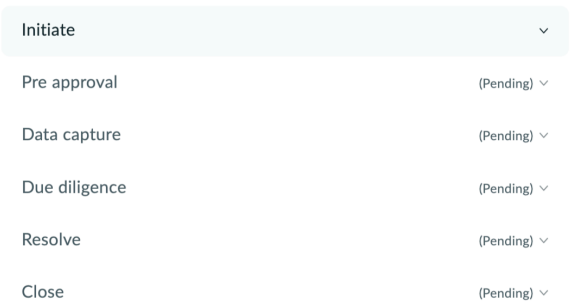
Playbook UI components

Term	Definition
Playbook picker	A playbook picker can be used to select a playbook in the user interface. A playbook picker is available if there are multiple playbooks on a record.
Stage picker	A stage picker displays the stages in a playbook. It gives the user a complete view of the playbook and where they are within the playbook. A stage picker can be oriented horizontally or vertically and includes icons that indicate the stage status.
Horizontal stage picker	A horizontal stage picker displays the playbook stages horizontally at the top of the record page and highlights the current stage. It displays activities within the current stage in the activity picker. 
Vertical stage picker	A vertical stage picker displays the playbook stages and activities vertically on the side of the record page. It highlights and expands the current stage to display the activities within that stage. 
Activity picker	The activity picker displays the activities in the current stage. It includes indicators that show the activity state.
Activity viewer	The activity viewer displays the details of the current activity. This is where a user performs the work necessary to complete the current activity.
Activity card	An activity card displays the details of the current activity. Users use the cards to complete the work for each activity.

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Playbook page templates

Use playbook page templates to create pages and page variants for use in CRM Workspace. These pages and page variants provide agents with either horizontal or vertical playbooks that they can use to complete tasks and resolve cases.

The following page templates are available with the Playbooks for Customer Service Management application [com.sn_csm_playbook]. For more information, see Playbook plugins.

Playbook page templates

Page template	Description
Case playbook: horizontal stages	Includes a horizontal stage picker that displays across the top of the UI and shows persistent information in the left panel.
Case playbook: vertical stages	Includes a vertical stage picker that displays in the left panel. This stage picker can track overall progress on the UI in a vertical view.

Considerations for using these page templates include the number of stages that appear in the picker and the length of the stage names. For example, longer stage names in the horizontal playbook can be truncated.

Note: By default, the playbook page templates aren't active. To activate a page template, see Activate a playbook page or page variant.

Case playbook: horizontal stages page template

The Case playbook: Horizontal stages page template includes a horizontal stage picker across the top of the page and an activity picker on the left side. For details about the components included in this template, see Playbook template components.

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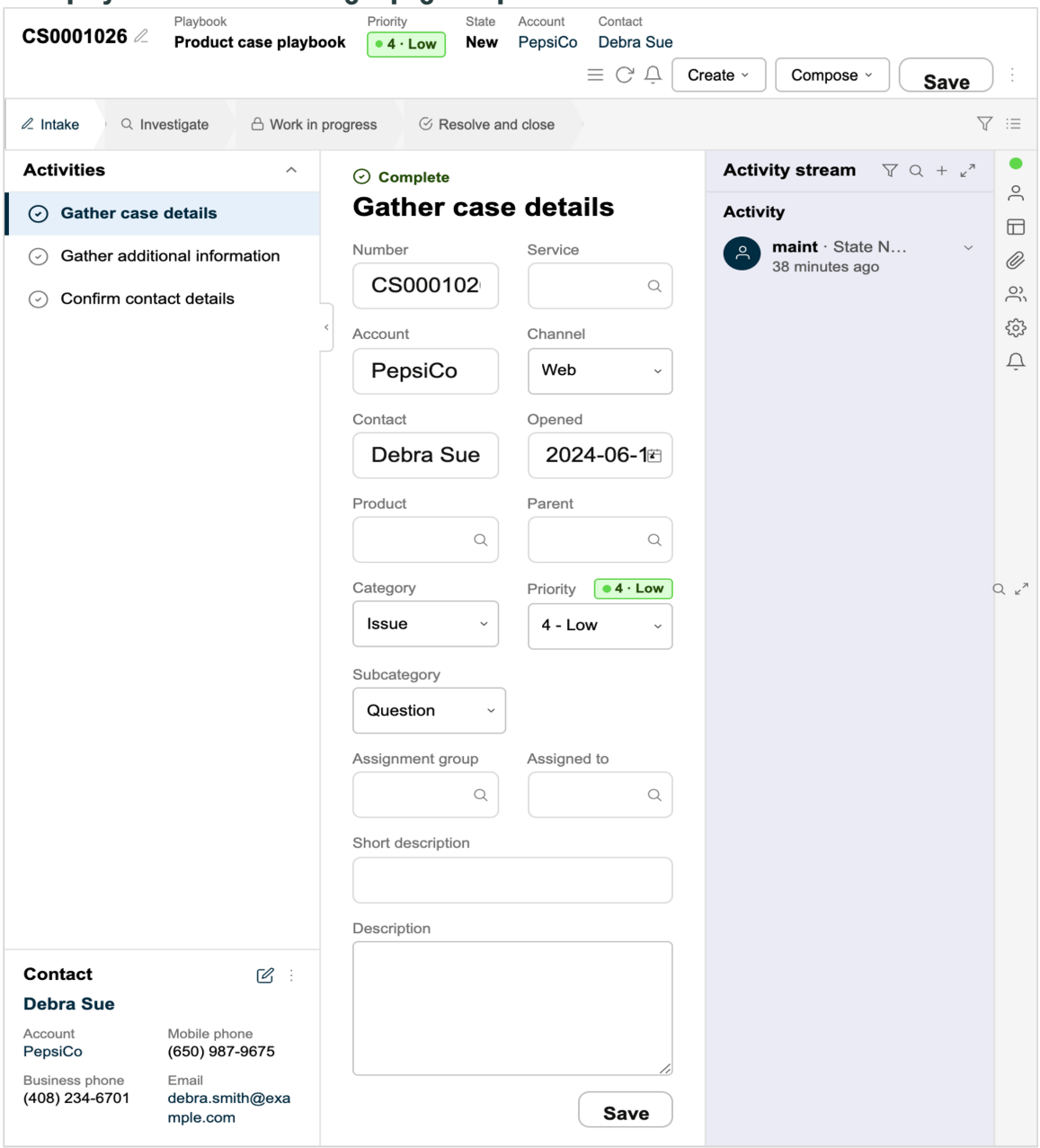
Case playbook: horizontal stages page template



Case playbook: vertical stages page template

The Case playbook: Vertical stages page template includes a vertical stage picker on the left side of the page. For details about the components included in this template, see Playbook template components.

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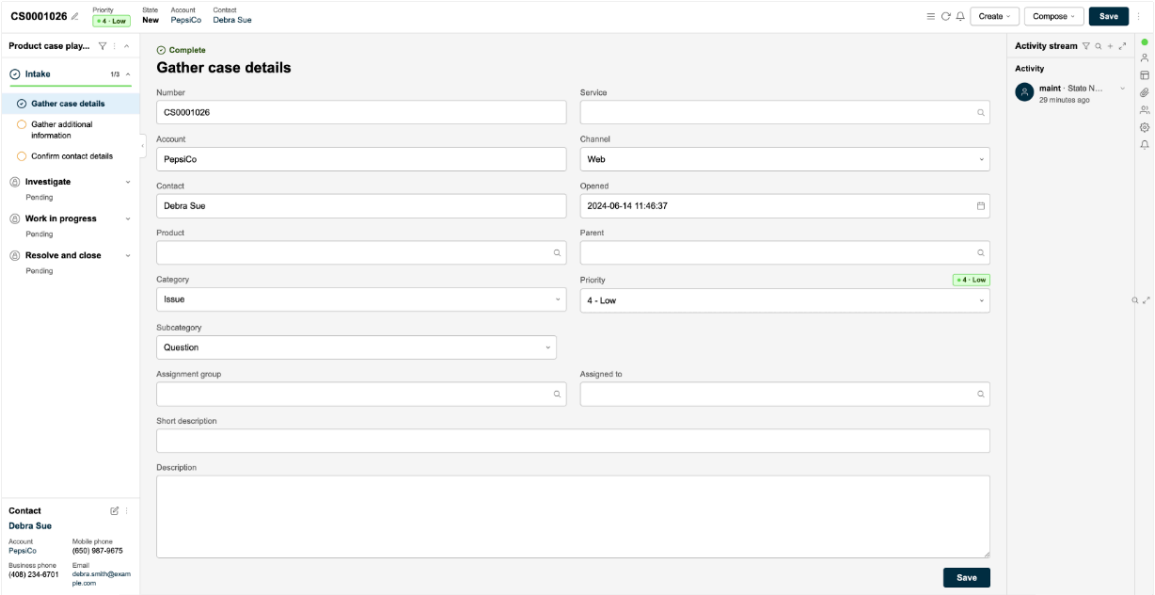
Case playbook: vertical stages page template



Playbook page template components

The playbook page templates include modular components that enable you to quickly build playbook pages in UI Builder.

Case playbook page template components

Component	Description
Page header	The page header includes record information that is displayed in the primary and secondary fields: • The primary field displays the short description of the record. • The secondary fields display the additional record information such as the priority, state, and contact or consumer details. You can configure the fields that appear in the page header. For more information, see Customize the page header for a playbook page.
Action bar	The action bar contains the actions that are available to users while working on case records. The available actions are determined by factors such as the user role, case state, and other attributes. • **Record Details**: Displays the record details. • **Playbook Details**: Displays the playbook details. • **In-progress actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Create**: Create records such as requests, incidents, and work orders.

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Case playbook page template components (continued)

Component	Description
	• **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap. You can configure the actions that are included in the action bar. For more information, see Customize UI actions for a playbook page.
Playbook name	In the Case playbook: horizontal stages template, the playbook name appears in the form header above the horizontal stage picker. In the Case playbook: vertical stages template, the playbook name appears at the top of the vertical stage picker.
Stage picker	The playbook templates include either a horizontal or vertical stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. • The horizontal stage picker displays the playbook stages across the top of the record page below the page header. Select a stage to see the activities in the activity picker. • The vertical stage picker displays the playbook stages and activities on the side of the record page. Select a stage to expand the stage and display the included activities. The stages in the stage picker include icons that indicate the stage status: • A check mark indicates that the stage is complete. • A pen icon indicates the current stage. • A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.
Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the horizontal stage picker, you can expand or collapse the list of activities for the current stage. With the vertical stage picker, you can expand each stage to see the activities within that stage. Selecting an activity displays the details in the activity viewer.

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Case playbook page template components (continued)

Component	Description
Activity viewer	The activity viewer displays the selected activity. This is the main work area where an agent performs the work necessary to complete the current activity.
Activity cards	Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards to complete the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.
Contact or consumer lookup	The lookup component enables agents to look up contact or consumer information and display that information in a record card. These cards display customer information and provide quick access to details such name, email, and phone. The contact record card also includes account information. Agents can use the lookup component to do the following: • Search for a contact or consumer. • Link or unlink a contact or consumer record. • Edit and save the information in a linked contact or consumer record. • Select a reference field on a record card, such as a contact or consumer name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. For more information, see Playbook lookup component.
Case summarization	The case summarization component appears below the lookup component. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see Playbook case summarization component.
Record details	The case details component includes collapsible sections for: • Case • Notes

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Case playbook page template components (continued)

Component	Description
	• Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL. Agents can view case details by selecting the **Record Details** button in the action bar.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Case playbook: horizontal stages page includes the following tabs. • Activity Stream • Agent Assist • Search • Related Items • Attachments • Response Templates • Email Templates • Templates • Record Information For more information about the tabs in the contextual side panel, see Playbook contextual side panel component.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, see Playbook activity stream component. **Note:** The Case playbook: horizontal stages page uses modeless dialogs for composing comments, work notes, and emails.
Compose email and Compose comments modeless dialogs	A modeless dialog is a window that overlays the main window content. You can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails as you work through the stages and activities in a playbook. For more information, see Playbook modeless dialogs.

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Using multiple form controllers

The multiple form controller feature enables page authors to add multiple form components to UI Builder templates. This feature is available with the following playbook page templates:

- Case playbook: horizontal stages
- Case playbook: vertical stages

With this feature, page authors can:

- Integrate inline tabs with forms that use dedicated form controller instances, eliminating the need for page collections and enhancing UI Builder usability and runtime performance.
- Enhance record pages with custom component bundles that include a form controller.
- Incorporate modals containing forms into record pages, facilitating the transmission of notifications and form updates back to the main page.

For more information about using multiple form controllers, see Add forms to UI Builder pages.

Playbook activity stream component

The activity stream component displays a list of activities occurring on a case record.

The activities in the list can be collapsed or expanded. When collapsed, the agent can quickly scan the list to get an overview of case activities. When expanded, the agent can see detailed information on individual activities.

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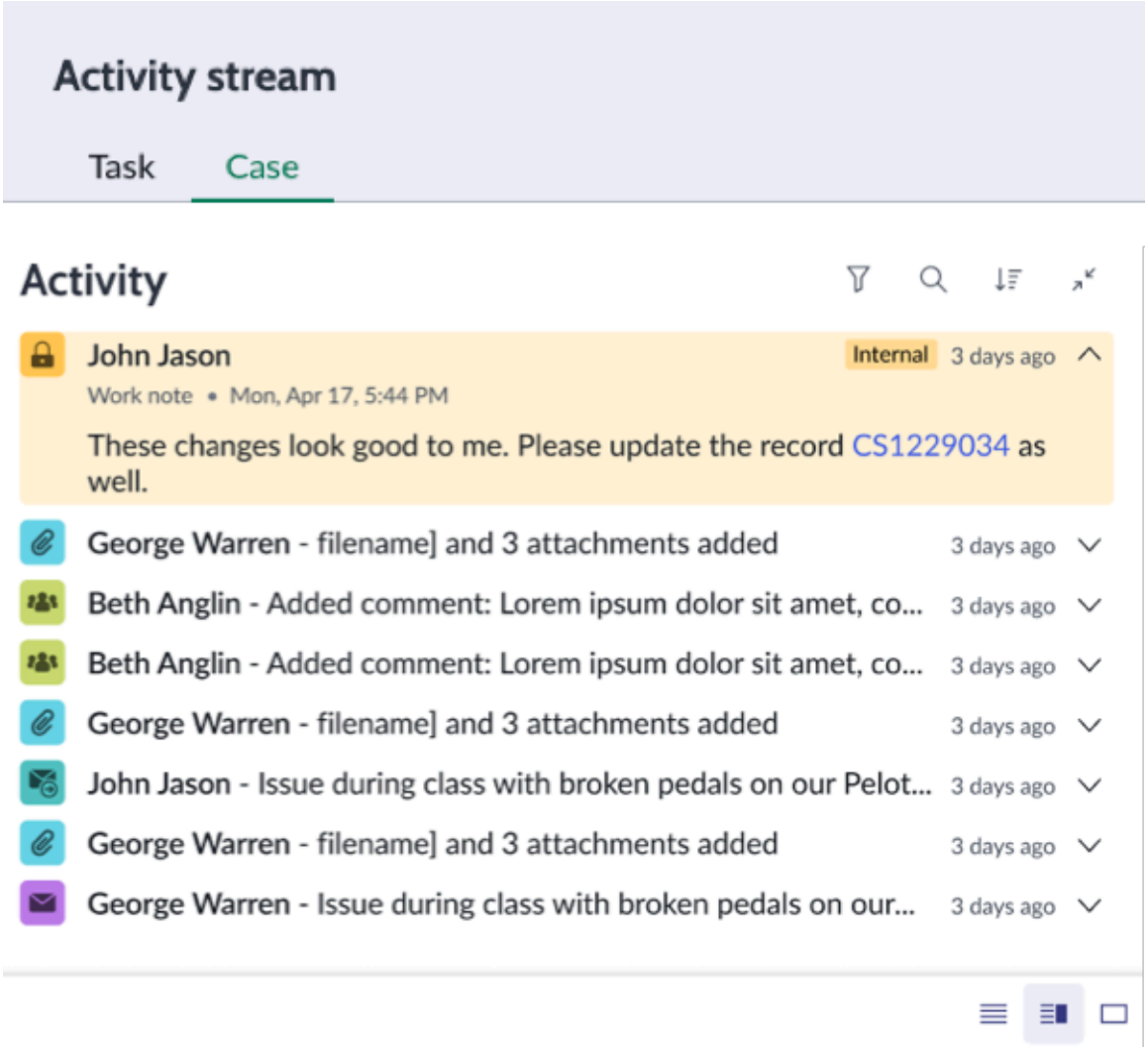
Playbook activity stream component



Note: The activity stream uses Modeless dialogs for composing comments, work notes, and emails.

Activity stream Case and Task tabs

The activity stream component includes tabs for tasks and cases. The Task tab appears when an agent is working on a playbook activity whose associated record is a case task.

Activity stream tiles

The activities in the activity stream are represented by tiles that use icons and colors to indicate the activity type. These activity types include:

- Comment
- Work note
- Attachment
- Field change
- Email sent or email received
- Chat discussion
- Custom icon

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When collapsed, each activity in the list includes:

- A tile that represents the activity type.
- The name of the user responsible for the activity.
- A brief one-line summary of the activity.
- A badge that indicates if an activity is internal or external.
- A relative timestamp.
- An expand button that the agent can use to see a detailed summary of the activity.

When expanded, each activity also includes:

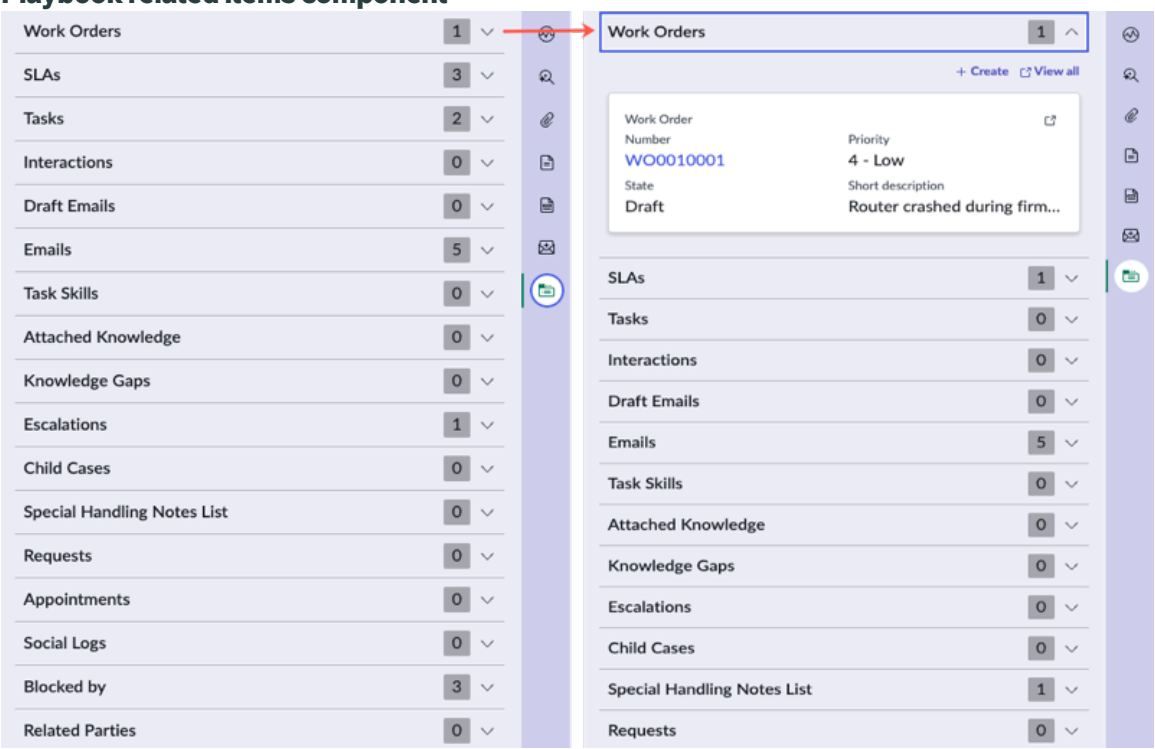
- A full date and timestamp.
- An action label that describes the type of activity.
- For comments and work notes, the full text of the comment or work note.
- For field updates, the field name and the updated field value.
- For emails, detailed message information.
- For attachments, a small preview of the attached file.
- For chats, a sidebar chat card.

Playbook related items component

The related items component provides access to the case-related lists.

The related items component uses an expandable accordion format. Agents can expand the desired lists to see the related items. This component also displays an icon with the number of items in a list.

Playbook related items component



Related lists include the following actions:

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- **Create**: Opens an empty record in a subtab that the agent can use to create an item.
- **View all**: Opens a list of records in a subtab.
- **Show more**: Is displayed for lists that have more than five items.

The items in an expanded list are displayed as cards. An expanded list shows one card for each item in the list.

- Agents can open an item in a subtab.
- If a list has more than five items, it includes a **Show more** option.

Playbook lookup component

The playbook lookup component enables agents to look up contact and consumer records.

Using the lookup component, agents can do the following:

- Look up a contact or consumer by name, phone number, or email address. As the agent types characters in the search box, matching information appears in record cards below the search box.
- Select a contact or consumer after searching by selecting the link icon on the desired record card. The selected record card replaces the lookup component.

Agents can perform the following actions from a record card:

- Remove a linked contact or consumer from a case record by selecting the more actions icon and then selecting **Unlink**.
- Edit and save a linked contact record by selecting the pencil icon, editing the information for the contact, and selecting **Save**.
- Select a reference field on a lookup card to open the referenced record in a sub-tab.
- Select an email address on a lookup card to open to open the email composer in a sub-tab.
- Select a phone number on a lookup card to make a phone call.

Note: An account lookup component is also available. To display this component, turn off the **Hide component** setting for this component in UI Builder. This setting is located in the Component visibility section of the Configure tab.

Playbook contextual side panel component

The playbook contextual side panel component provides agents with access to tools and information such as the activity stream, templates, and attachments.

The contextual side panel component provides agents with the following functionality.

Tabs in the contextual side panel

Tab	Description
Activity Stream	The activity stream displays a list of activities occurring on a case record. For more information, see Playbook activity stream component.
Agent Assist	Agent assist provides agents with a list of resources that show possible solutions for the current record. This list is based on the record short description.

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Tabs in the contextual side panel (continued)

Tab	Description

Search	The Search tab includes AI search functionality. Agents can use AI search to find relevant resources or resolutions for customer issues.
	
	The search feature displays an initial set of search results based on the text in the case short description. This initial set of results includes knowledge articles. Agents can also enter different search keywords and repeat the search.
	
	From the list of search results, agents can do the following:
	• Select a source to see search results of that type.
	• Filter the list of search results.
	• Sort the list of search results.
	• Open the search results in full view in a record sub-tab.
	• Take the following actions:
	  ○ View and attach article
	  ○ Perform other actions such as reading articles in full view, flagging articles, or marking articles as helpful or unhelpful.
	• View successful actions by selecting the Actions history icon.
	
	For more information, see Use AI search in Recommended Actions to resolve cases.
	
	Note: Using Recommended Actions in the contextual side panel requires the Recommended Actions application (sn_cs_nb_action) which is included with the CRM Workspaceapplication.

Related Items	The Related Items tab provides access to the case-related lists. The Case playbook: 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. An indicator displays the number of records available in a related list. When expanded, the records in a related list are displayed in card format. For more information, see Playbook related items component.
Attachments	The Attachments tab provides access to case-related attachments. From this tab, agents can view and download attachments.
Response Templates	The Response Templates tab provides access to available response templates. These templates contain reusable

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Tabs in the contextual side panel (continued)

Tab	Description
	messages that agents can copy to provide quick and consistent messages to customers.
Email Templates	The Email Templates tab provides access to available email templates. These templates contain default values for fields that agents can add to email messages. These default values can include recipients (email addresses in To, Cc, and Bcc), sender, subject, and text for the message body. For more information, see Email Templates.
Templates	The Templates tab provides access to available form templates which enable agents to automatically populate fields on new records. Agents can manually apply a template when creating a new record such as an incident or change.
Record Information	The Record Information tab includes the following cards: • **Overview**: Displays relevant information about the case including the account and contact, the case priority, and the state. • **Contact**: Displays customer information including the name, title, phone numbers, and email address. • **Timeline**: Displays a chronological summary of case activities, including case state changes and interactions between the agent and the requester. • **Active SLA**: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches.

Playbook modeless dialogs

Use modeless dialogs, windows that overlay the main window content, to create and post comments and work notes to the activity stream and to compose and send emails.

A modeless dialog is a window that appears in a workspace as an overlay on top of the main window content. This overlay enables users to interact with the window content and the overlay content at the same time. Agents can use modeless dialogs to do the following while working in a playbook:

- Create comments and work notes to post to the activity stream.
- Create and send emails and reply to or forward emails.

After opening a modeless dialog, agents can move it around the screen and put it where they need it. This feature enables agents to reference information from the main window while drafting text in the overlay window.

The playbook page templates include the following modeless dialogs:

- Compose Activity - for creating and posting comments and work notes
- Compose Email - for creating and sending emails

You can access the modeless dialogs by selecting the **Compose** button in the action bar and then selecting one of the following actions:

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- Compose Comments
- Compose Email
- Compose Work notes (Private)

Create comments and work notes

Agents can use the Compose Activity modeless dialog to create comments and work notes and post them to the activity stream. See the following table for more information about creating these activities.

Using the Compose Activity modeless dialog to create comments and work notes

Task	Description
Create a comment or work note	To create a comment or a work note: **1.** Select one of the following actions from the action bar to open a Compose window: ○ **Compose** > **Compose Comments** ○ **Compose** > **Compose Work notes (Private)** **2.** Add the text to the Compose window. When creating comments and work notes: • Agents can create one draft comment and one draft work note at a time before posting the text to the activity stream. • Agents can open one Compose window at a time. If an agent opens a second window, the previously opened window is minimized.
Post a comment or work note to the activity stream	To post a comment or work note, select one of the following actions from the Compose window: • **Post Comment** • **Post Work Notes (Private)** The Compose window automatically closes after the text is posted to the activity stream. Saving the case record also posts the comment or work note to the activity stream and closes the Compose window.
Minimize a Compose window	Composed windows can be minimized and moved to the In-process Actions menu in the action bar. Minimized comments and work notes appear in a list in the In-process Actions menu. Compose windows can be minimized in the following ways.

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Using the Compose Activity modeless dialog to create comments and work notes (continued)

Task	Description
	• Select the Minimize button in the Compose window header. • One Compose window can be open at a time. If an agent opens another Compose window, the first window is minimized.
Open a minimized Compose window	Select the In-progress Actions menu in the action bar and then select an item from the list to open the window. Items in the In-process Actions menu appear in a list with the action type (email, comment, or work note) and an abbreviated title. • For email, the title is the email subject. • For comments and work notes, the title is the first line of text.
Discard a comment or work note	To discard a comment or work note: **1.** Select the Close button in the Compose window header. **2.** Confirm the Discard action by selecting **Discard** in the confirmation pop-up window. The system closes the Compose window and discards the comment or work note.

The following guidelines apply to Compose windows:

- Draft comments and work notes are local to the browser and are cleared if the browser page is reloaded.
- Comments and work notes stay in sync on the form and in the modeless dialogs.
- The Compose window has a fixed size.

Create emails

Agents can use the Compose Email modeless dialog to create and save email drafts and to send emails. This feature increases the speed of drafting emails while referencing record information.

Emails that are sent from a Compose Email window are posted to the activity stream. Agents can reply to and forward emails from the activity stream. See the following table for more information about creating and sending emails.

Using the Compose Email modeless dialog to create and send emails

Task	Description
Create and send an email	To create and send an email:

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
	1. Select **Compose** > **Compose Email** from the action bar to open a Compose Email window. The system automatically applies the email template with the lowest order to the new email. **2.** Fill out the fields: **a.** To, Cc, Bcc **b.** Subject **c.** Email body **3.** Select **Send email**. When creating emails and sending emails: • The Compose Email window automatically closes after the email is sent. • The email is posted to the activity stream.
Reply to or forward an email	To reply to or forward an email: **1.** Expand an email in the activity stream. **2.** Select one of the following buttons to open the Compose Email window: ○ **Reply** ○ **Reply all** ○ **Forward** **3.** Add the desired text. **4.** Select **Send email**. The Compose Email window automatically closes after the email is posted to the activity stream.
Add a link to a knowledge article	To add a link to a knowledge article: **1.** Select the Agent Assist tab in the contextual side panel. **2.** View the list of knowledge articles or search for an article. **3.** Select the More Actions menu on the knowledge article card. **4.** Select **Add link in email**. The system adds the title of the article with a link in the body of the email.

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
Apply a template to an email	To apply a template to an email: **1.** Open the Email Templates tab in the contextual side panel. **2.** Select the More Actions menu on the desired email template. **3.** Select **Apply template**. The system adds the contents of the template to the body of the email. **Note:** When you create a new email, the system automatically applies the email template with the lowest order.
Minimize a Compose Email window	Minimized emails appear in a list in the In-process Actions menu in the action bar. Select the Minimize icon ( ) in the Compose Email window header to move the email draft to the In-progress Actions menu.
Open a minimized Compose Email window	Select an item from the In-progress Actions menu to open the Compose Email window. Items in the In-process Actions menu appear in a list with the action type (email, comment, or work note) and an abbreviated title. • For email, the title is the email subject. • For comments and work notes, the title is the first line of text.
Maximize a Compose Email window	Select the Maximize icon ( ) in the Compose Email window header to expand the Compose Email window to the full screen. Select the Maximize icon again to exit the Maximize mode.
Open a draft email in a sub-tab	Select the Pop out icon ( ) in the Compose Email window header to open the draft email in a sub-tab. The Compose Email window closes when the email opens in the sub-tab.
Close a Compose Email window	Select the Close icon ( ) in the Compose Email window header.

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Using the Compose Email modeless dialog to create and send emails (continued)

Task	Description
	The system saves the text as a draft email and closes the Compose Email window.
Select an email draft from the Draft Emails related list	**1.** Select the Related Lists tab in the contextual side panel. **2.** Expand the Draft Emails related list. **3.** Select the Open draft icon on the desired draft email card. The system opens the selected draft email in a sub-tab.

Modeless dialog guidelines

The following guidelines apply to the Compose Email window:

- An agent can create multiple email drafts.
- An agent can have one Compose Email window open at a time. The system displays a message if an agent tries to open another Compose Email window while the first Compose Email window is still open.
- An agent has to manually close a Compose Email window before opening a new window.
- The Compose Email window can be resized.

Playbook case summarization component

The playbook case summary component provides agents with a summary of a customer service case, including the issue and the actions taken. Agents can generate summaries to understand case context and post summaries to the case work notes.

The case summarization component appears below the lookup component on the playbook page templates. Upon first opening a case, agents see that the component is collapsed and in the default state.

Using this component, agents can:

- Select **Summarize** to create a summary of the case details.
- Select **Share to work notes** to copy the summary text to the activity stream.
  - Review the summary text in the Share to work notes popup window and modify the text as needed.
  - Select **Save to work notes** on the popup window to add the text to the activity stream.
- Select the refresh icon in the component footer to refresh the text and get the latest summary.

Note: If the case does not contain enough text to summarize, the system displays the following message: "This case doesn't have the minimum number of words required for summarization yet."

To use the case summarization component with the playbook page templates, activate the Now Assist for Customer Service Management (CSM) application and configure the case summarization skill in the Now Assist Admin console. For more information, see:

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- Activate Now Assist for Customer Service Management (CSM)
- Configure the case summarization skill in the Now Assist Admin console.

Playbook pages

Use playbook pages in CRM Workspace so that your agents can view the stages and activities in a playbook, work on activities, and have quick access to in-context information.

Overview of templates, pages, and page variants

Pages provide the base structure for how the system displays record information in CRM Workspace. You can create and customize pages with UI Builder, a web user interface builder.

A page template is a pre-defined page configuration. When you create a page in UI Builder, you can select a page template as a starting point. You can also create a page from scratch or by copying another page and then customizing the page to meet your needs.

A page variant is a version of a page that includes unique settings such as the audience, conditions, and page order. For more information about templates, pages, and page variants, see Creating pages and page variants.

Pages and page variants can also include playbooks, which are created in Workflow Studio. A playbook provides step-by-step guidance for resolving a specific type of case. The workflows that are associated with a specific type of case and the activities that need to be completed to resolve cases of this type are detailed in the playbook.

Playbook pages

The Playbooks for Customer Service Management plugin provides the following playbook pages:

- Case playbook: horizontal stages page
- Case playbook: vertical stages page

Additional CSM playbook applications provide playbook pages that you can activate and use with case types in CRM Workspace.

Playbook applications and playbook pages

Application	Page variant	Description
Case Playbook for Complaints v5.0	Complaint case process page	Includes a horizontal stage picker that provides an end-to-end view of the complaint process.
Case Playbook for Onboarding v5.0	Onboarding case process page	This playbook page includes a horizontal stage picker at the top of the record that provides an end-to-end view of the onboarding process.
Case Playbook for Product Support v4.0	Product Support process page	This playbook page includes a horizontal stage picker at the top of the record that provides an end-to-end view of the product support process.

For more information, see Playbook plugins.

Note: By default, playbook pages are read-only. To use a playbook page, activate the page and set the page order.

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Benefits of using playbook pages

Resolving customer issues or requests often involves the execution of tasks across multiple users, departments, and systems. Different users are responsible for different tasks within the overall resolution process. Using playbooks provides the following benefits:

- An experience that is tailored to customer service agents and other users.
- Visibility into the overall resolution process, the current stage in the process, and the activities that need to be completed within that stage.
- Access to in-context information.

Configuring playbook pages

The following table includes configuration tasks for playbook pages.

Playbook page configuration tasks

Task	Description
Activate a playbook page or page variant	Activate a playbook page or page variant and set the page order. **Note:** Some playbook pages and page variants are not active by default.
Customize the page header for a playbook page	Configure the page header for a playbook page. The page header includes a primary value and several secondary values. These fields can provide case, account, and contact information at a glance.
Customize UI actions for a playbook page	Configure the UI actions to display in the action bar for a playbook page.
Customize content in the left side panel for a playbook page	Add custom components in the side panel. By default, this panel includes the Customer 360, Timeline, and Active SLA components.
Customize tabs in the contextual side panel for a playbook page	Add or remove the tabs from the contextual side panel. Agents can use these tabs to perform tasks such as adding attachments and viewing recommendations.
Customize the dynamic related records for a playbook page	Configure the Dynamic Related Records feature to display the related records in the contextual side panel.
Configure the app route to use an existing subpage	Create an app route to make an existing page a part of the page collection.
Configure an optional activity for a playbook	Configure an optional activity in#Workflow Studio at various stages in a playbook so that agents and fulfillers can insert an activity when they are using the playbook.
Set up a record generator for case type	Create a record for a case type as the first step in a playbook by using a playbook record generator.

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Playbook page configuration tasks (continued)

Task	Description
Configure an email template	Configure new email templates to enable agents to create emails for common issues.

Using playbook pages

Playbooks enable your agents to view and complete their tasks more efficiently.

Playbook user tasks

User task	Description
Create a record using a playbook	If a playbook is configured to use the playbook record generator feature, an agent can create a record by using a playbook activity. Creating a record opens the playbook and initiates the first activity, which is to guide an agent through the record creation process. After saving the case, an agent moves to the next activity in the current stage or to the first activity in the next stage.
Resolve a case using a playbook	Opening a case takes the agent to the first open assigned activity. An agent can do the following actions while working on the activities in a playbook: • View the entire playbook process in the horizontal stage picker. • View the activities for each stage in the stacked playbook activity view. • Use the activity stream in the contextual side panel • Filter activity cards. • Select an activity and perform the work required in the main work area. • View and update the case details by using the **View Details** button. • View the persistent contextual information in the left side panel, such as the account and contact. • View the related list tabs in the Dynamic related records component in the contextual side panel. • Access information in the contextual side panel, including the activity stream, form ribbon, Agent Assist, Dynamic related records, attachments, and templates.

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Playbook user tasks (continued)

User task	Description
	• Create tasks, compose email, and add worknotes. • Open reference fields in subtabs under the session tab.
Add an activity to a playbook	Add optional activities to a playbook stage as needed.
Summarize case details	Use the ServiceNow Otto for CSM case summarization skill to summarize the case details and display this information on the case record.
Compose an email from an email template	Quickly compose emails for common issues by selecting an email template in the Compose Email page instead of manually drafting an email.

Note: For tasks that an agent completes outside of a playbook, the system automatically updates the playbook activities.

Case playbook: horizontal stages record page

The Case playbook: horizontal stages page is a record page that you can use in CRM Workspace. This page includes a playbook with a horizontal stage picker that displays across the top of the user interface and persistent information in the left panel.

The Case playbook: horizontal stages record page is created from the Case playbook: horizontal stages template.

The Case playbook: horizontal stages record page is available with the Playbooks for Customer Service Management v6.0 store application. For more information, see Playbook plugins.

Case playbook: horizontal stages page variant

The Case playbook: horizontal stages page variant is included with the Playbooks for Customer Service Management v6.0 store application. This variant includes the following settings.

Case playbook: horizontal stages page variant settings

Setting	Description
Active	The Case playbook: horizontal stages page variant is not active by default. Enabling the **Active** check box makes the page variant available to the selected audience. The **Active** setting combined with the page order determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority.

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Case playbook: horizontal stages page variant settings (continued)

Setting	Description
	The default order for the Case playbook: horizontal stages page variant is -1.
Conditions	Conditions determine when a page variant is displayed. The Case playbook: horizontal stages page variant has the following condition: **table=sn_customerservice_case** This condition limits the use of the Case playbook: horizontal stages page variant to records from the Case [sn_customerservice_case] table and tables that extend the Case table.
Audience	The audience determines who can see the page variant. The Case playbook: horizontal stages page variant does not have an audience. This means everyone with access to the experience can see this page variant. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the CRM Workspace experience.
3. In the Record section of the Pages and variants list, select **Case playbook: horizontal stages**.
4. Select **Settings** at the top of the page.

Case playbook: horizontal stages page components

The Case playbook: horizontal stages page includes the following components.

Component	Description
Page header	The page header includes record information that is displayed in the primary and secondary fields: • The primary field displays the short description of the record. • The secondary fields display the additional record information such as the priority, state, and contact or consumer details. You can configure the fields that appear in the page header. For more information, see Customize the page header for a playbook page.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records.
Action bar	The action bar contains the actions available to users while working on case records. The specific actions are determined

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Component	Description
	by factors such as the user role, case state, and other attributes. • **Record details**: Displays the record details. • **Playbook details**: Displays the playbook details. • **In-progress Actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Create**: Create records such as work orders, incidents, and requests. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap. You can configure the actions that are included in the action bar. For more information, see Customize UI actions for a playbook page.
Playbook name	In the Case playbook: horizontal stages page variant, the playbook name appears in the form header above the horizontal stage picker.
Stage picker	The Case playbook: horizontal stages page variant includes a horizontal stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. The horizontal stage picker displays the playbook stages across the top of the record page below the page header. Select a stage to see the activities in the activity picker. The stages in the stage picker include icons that indicate the stage status: • A check mark indicates that the stage is complete. • A pen icon indicates the current stage. • A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.
Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the horizontal stage picker, you can expand or collapse the list of activities for the current stage. Selecting an activity in a stage displays the details in the activity viewer.

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Component	Description
Activity viewer	The activity viewer displays the selected activity. This is the main work area where an agent performs the work necessary to complete the current activity. Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards to complete the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.
Contact or consumer lookup	The lookup component enables agents to look up contact or consumer information and display that information in a record card. These cards display customer information and provide quick access to details such name, email, and phone. The contact record card also includes account information. Agents can use the contact lookup component to do the following: • Search for a contact or consumer. • Link or unlink a contact or consumer record. • Edit and save the information in a linked contact or consumer record. • Select a reference field on a record card, such as a contact or consumer name, to open the reference in a sub-tab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. For more information, see Playbook lookup component.
Case summarization	The case summarization component appears below the lookup component. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see Playbook case summarization component.
Record details	The case details component includes collapsible sections for: • Case • Notes

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Component	Description
	• Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL. Agents can view case details by selecting the **Record Details** button in the action bar.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Case playbook: horizontal stages page includes the following tabs. • Activity Stream • Agent Assist • Recommended Actions • Related Items • Attachments • Response Templates • Email Templates • Templates • Record Information For more information about the tabs in the contextual side panel, see Playbook contextual side panel component.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, see Playbook activity stream component. **Note:** The Case playbook: horizontal stages page uses modeless dialogs for composing comments, work notes, and emails.
Compose email and Compose comments modeless dialogs	A modeless dialog is a window that overlays the main window content. You can use modeless dialogs to create and post comments and work notes to the activity stream and to compose and send emails as you work through the stages and activities in a playbook. For more information, see Playbook modeless dialogs.

Case playbook: vertical stages record page

The Case playbook: vertical stages page is a record page that you can use in CRM Workspace. This page includes a playbook with a vertical stage picker that displays in the left panel and can track overall progress on the UI in a vertical view.

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The Case playbook: vertical stages record page is created from the Case playbook: vertical stages template.

The Case playbook: vertical stages record page is available with the Playbooks for Customer Service Management v6.0 store application. For more information, see Playbook plugins.

Case playbook: vertical stages page variant

The Case playbook: vertical stages page variant is included with the Playbooks for Customer Service Management v6.0 store application. This variant includes the following settings.

Case playbook: vertical stages page variant settings

Setting	Description
Active	The Case playbook: vertical stages page variant is not active by default. Enabling the **Active** check box makes the page variant available to the selected audience. The **Active** setting combined with the page order determines the page that CRM Workspace uses to display record information. For more information, see Set record page order.
Order	Each record page has an order which indicates the page priority. The lower the number, the higher the priority. The default order for the Case playbook: vertical stages page variant is -1.
Conditions	Conditions determine when a page variant is displayed. The Case playbook: vertical stages page variant has the following condition: **table=sn_customerservice_case** This condition limits the use of the Case playbook: vertical stages page variant to records from the Case [sn_customerservice_case] table and tables that extend the Case table.
Audience	The audience determines who can see the page variant. The Case playbook: vertical stages page variant doesn't have an audience. This means everyone with access to the experience can see this page variant. For more information, see Learn about audiences.

To access the settings for this page variant:

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the CRM Workspace experience.
3. In the Record section of the Pages and variants list, select **Case playbook: vertical stages**.
4. Select **Settings** at the top of the page.

Case playbook: vertical stages page components

The Case playbook: vertical stages page includes the following components.

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Component	Description
Form heading	The page header includes record information that is displayed in the primary and secondary fields: • The primary field displays the short description of the record. • The secondary fields display the additional record information such as the priority, state, and contact or consumer details. You can configure the fields that appear in the page header. For more information, see Customize the page header for a playbook page.
Record tags	Agents can create multiple tags for a record and then use the tags to group and organize records.
Action bar	The action bar contains the actions available to users while working on case records. The specific actions are determined by factors such as the user role, case state, and other attributes. • **Record details**: Displays the record details. • **Playbook details**: Displays the playbook details. • **In-progress Actions**: Provides a list of minimized modeless dialogs and includes a badge that displays the number of items in the list. From this list, an agent can select an item to open the minimized comment, work note, or email. • **Create**: Create records such as work orders, incidents, and requests. • **Compose**: Compose comments, work notes, and emails in modeless dialogs. • **Save**: Save changes to the case record. • **More Actions**: Perform additional actions such as proposing a major case or reporting a knowledge gap.
Playbook name	In the Case playbook: vertical stages page variant, the playbook name appears at the top of the vertical stage picker.
Stage picker	The Case playbook: vertical stages page variant includes a vertical stage picker, which gives the agent a complete view of the playbook and where they are within the playbook. The vertical stage picker displays the playbook stages and activities on the side of the record page. Select a stage to expand the stage and display the included activities. The stages in the stage picker include icons that indicate the stage status:

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Component	Description
	• A check mark indicates that the stage is complete. • A pen icon indicates the current stage. • A lock icon indicates that a stage is locked and can't be started until the previous stage is complete.
Activity picker	The activity picker displays the activities for the current stage. Each activity has an indicator that shows the activity state: • Completed • In progress • Remaining With the vertical stage picker, you can expand each stage to see the activities within that stage. Selecting an activity in a stage displays the details in the activity viewer.
Activity viewer	The activity viewer displays the selected activity, which is the main work area where an agent performs the work necessary to complete the current activity. Activity cards display the details about the current activity in the activity viewer. Depending on the type of activity, the activity cards can display information such as form data, task status, SLA timers, or attachments. Agents use the cards for completing the work for each activity, such as filling in forms, completing checklists, completing tasks, or adding attachments.
Contact or consumer lookup	The lookup component enables agents to look up contact or consumer information and display that information in a record card. These cards display customer information and provide

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Component	Description
	quick access to details such name, email, and phone. The contact record card also includes account information. Agents can use the contact lookup component to do the following: • Search for a contact or consumer. • Link or unlink a contact or consumer record. • Edit and save the information in a linked contact or consumer record. • Select a reference field on a record card, such as a contact or consumer name, to open the reference in a subtab. • Select an email address on a lookup card to open a draft email in the email composer in a sub-tab. • Select a phone number on a lookup card to make a call. For more information, see Playbook lookup component.
Case summarization	The case summarization component appears below the lookup component. When an agent opens a case record, the component is collapsed and in the default state. Agents can use this component to do the following: • Summarize case details. • Post the summary to the activity stream. • Refresh the summary. The case summarization component requires the Now Assist for Customer Service Management (CSM) application to be activated and configured. For more information, see Playbook case summarization component.
Record details	The case details component includes collapsible sections for: • Case • Notes • Closure Information • Related Records This component also includes a menu with additional form actions, such as personalizing the form, exporting data, and copying the URL. Agents can view case details by selecting the **Record Details** button in the action bar.
Contextual side panel	The contextual side panel component includes different tools that agents can use to research and resolve customer issues. The contextual side panel in the Case playbook: horizontal stages page includes the following tabs.

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Component	Description
	• Activity Stream • Agent Assist • Recommended Actions • Related Items • Attachments • Response Templates • Email Templates • Templates • Record Information For more information about the tabs in the contextual side panel, see Playbook contextual side panel component.
Activity stream	The activity stream component displays a list of activities occurring on a case record. This list can be collapsed to provide a quick view of case activities or expanded to provide more detail about individual activities. For more information, For more information, see Playbook activity stream component. **Note:** The Case playbook: vertical stages page uses modeless dialogs for composing comments, work notes, and emails.
Compose email and Compose comments modeless dialogs	A modeless dialog is a window that overlays the main window content. You can use modeless dialogs to create and post comments and work notes to the activity stream. You can also compose and send emails as you work through the stages and activities in a playbook. For more information, see Playbook modeless dialogs.

Activate a playbook page or page variant

Activate a playbook page or page variant and set the page order. The system uses the active page with the lowest order number to display records in CRM Workspace.

Before you begin

Role required: ui_builder_admin, admin

Some playbook pages and page variants are not active by default. You need to activate the pages and set the page order before using the pages in CRM Workspace.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the Experiences list, select CRM Workspace.
3. Find one of the following pages by scrolling through the Pages and variants list to the Record section:
   - Case playbook: horizontal stages
   - Case playbook: vertical stages

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- Complaint case process page
- Onboarding case process page
- Product Support process page

Note: These pages may be marked as **Inactive**.

4. Display the page settings by selecting **Settings** for the desired page or page variant.
5. Activate the page by selecting the **Active** check box.
6. In the **Order** field, set the order number for the page.
   Each page has an order number. The page with the lowest order number is the default page. When the system displays a record in CRM Workspace, it uses this default page to display the record information. For more information, see Set record page order.
7. In the **Variant conditions** field, specify the table value.
   Add the table values for the case types where you want to see this page variant.
8. Select **Save**.

Related topics

Create a page from a template

Edit a page

Create a page variant

Edit page variant settings

Customize the page header for a playbook page

Customize the page header by defining the primary and secondary fields that are displayed in CRM Workspace.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

About this task

Overview information for a record is available in the page header.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Header Configurations**.
2. Select the CRM Workspace header configuration.
3. Select a table from the UX Form Headers list.
   You can also create a UX Form Header record. For more information, see Set up a form header in CRM Workspace.
4. Select the **Primary field** to display in the form header.
5. In the Secondary values related list, select the secondary values to display in the form header.
   a. In the **Order** field, set the sequential order in which to display the secondary values.
   b. Select **Update** to save the form header record.
6. In the **Order** field, set the sequential order in which to display the secondary values.
7. Select **Update** to save the UX header configuration record.

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Related topics

Set up a form header in CRM Workspace

Display the form ribbon and form header secondary values in the Contextual side panel

Customize UI actions for a playbook page

You can customize the UI actions that appear in the action bar for a playbook page or page variant.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

Note: Any changes made to the configuration will affect other record pages and page variants where the action bar component is used.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Declarative Actions** > **Form Actions**.
2. Select an **Action label** to display the Action Assignment form.
3. Click **Edit** to include or exclude a particular action on the UI.
4. Click **Update**.

Related topics

UI Action Bar

Set up a form action in CRM Workspace

Customize content in the left side panel for a playbook page

Components that can be added to the left side panel include Customer360, Timeline, Active SLA, or a custom ribbon component. You can update the ribbon component attributes based on the fields you want to display in the left side panel on the playbook page.

Before you begin

Role required: workspace_admin, ui_builder_admin, admin

Note:

Any changes made to the configuration will affect other record pages and page variants where this ribbon setting is used.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Ribbon Setting**.
2. Select a ribbon setting for your table.
   If a ribbon setting doesn't exist for your table, you can create one. For more information, see Set up a ribbon configuration in CRM Workspace.
3. Select values for the **Ribbon component** and the **Ribbon Component Attributes**.
4. Select **Update**.

Customize tabs in the contextual side panel for a playbook page

Add customized tabs in the contextual side panel. Agents can use these tabs to view case information, add attachments, view recommendations, and perform other case-related actions.

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Before you begin
Role required: workspace_admin, ui_builder_admin, admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. On the UI Builder home page, select the **Page collections** tab.
3. Select the desired page collection.
   A page collection is a group of pages that you can use in multiple experiences.
4. In the Pages and variants section, select the Create new page icon (**+**) to create a new page or add a variant to a page.
5. In the Set up your page details pop-up window, enter a name for the page and then select **Continue**.
6. Create a default page by entering a name for the variant and selecting **Create**.
   The new page appears under the Pages and variants list.
7. Select the newly created page name.
8. Add a component to the page collection by selecting **+Add component**.
   You can create a subpage that gets displayed in the contextual side panel.

Result
The added component gets displayed on the UI. The location depends on where you want to create the custom content on the page.

Related topics

Hide tabs in the contextual side panel

Customize a record page

Set record page order

Customize UI Builder pages using components

Customize the dynamic related records for a playbook page

Customize the dynamic related records for a playbook page to display in the contextual side panel in CRM Workspace. These records dynamically change depending on the context of the current record or playbook activity.

Before you begin
Role required: workspace_admin, ui_builder_admin, admin

About this task
The definitions for the related records aren't active by default. You must activate these definitions if you want them to appear in the related records.

Any change made to the customer service case dynamic related record context will also be applicable to all extensions of the customer service case. For creating custom context, see Configure related record contexts.

You must define an EVAM view configuration for the tables in addition to setting up Dynamic Related Records. For more information, see Define an EVAM view configuration.

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Procedure

1. Navigate to **All** > **Dynamic Related Records** > **Related Record Contexts**.
2. Select **Related Record Contexts** for either the Onboarding, Complaint, or Product Support table.
3. Activate all the related record definitions for the Onboarding, Complaint, or Product Support case.
   For more information, see Dynamic related records.
4. Select **Update**.

The following table shows the Dynamic Related Record list for each case type.

Dynamic Related Record list for different case types

Case type	Dynamic related record
Customer service case	○ Blocked By ○ Related Parties ○ Social Logs ○ Appointments ○ Requests ○ Special Handling Notes ○ Child Cases ○ Knowledge Gaps ○ Attached Knowledge ○ Task Skills ○ Emails ○ Draft Emails ○ Interactions ○ Tasks ○ Work Orders ○ Install base ○ Escalations ○ Service Level Agreement (SLA)
Complaint case	○ Emails ○ Blocked By ○ Involved Parties ○ Tasks ○ Sold Product ○ Active Contracts ○ Active Entitlement ○ Related Cases

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Case type	Dynamic related record
Onboarding case	○ Emails ○ Blocked By ○ Related Cases ○ Additional members ○ Tasks ○ Sold Product ○ Active Contracts ○ Approvers

Related topics

Configure dynamic related records

Configure related record definitions

Define an EVAM view configuration

Create a view configuration to combine conditions, database fields, and declarative actions with an associated view template.

Before you begin

Role required: admin or evam_admin

About this task

Entity View Action Mapper (EVAM) is an application that standardizes how different data sources display in cards and lists.

A view configuration combines conditions, database fields, and declarative actions with an associated view template. For more information, see View configurations, view templates, and configuration bundles for EVAM.

Procedure

1. Navigate to **All** > **Entity View Action Mapper (EVAM)** > **EVAM Definitions** > **Configuration Bundles**.
2. Select **dynamic_related_records_bundle** and then select **New**.
3. Fill in the fields on the EVAM view configuration form.

Field	Description
Name	Name of the EVAM view configuration.
Active	Option to activate the EVAM view configuration.
View Template	Template to associate with the EVAM view configuration. You can create a template or use an existing template.
Application	Application scope of the EVAM view configuration.
Order	Priority that the EVAM view configuration takes over other view configurations. To give higher priority to a view configuration, enter a lower number.
Table	Table to associate with the EVAM view configuration.

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Field	Description
Condition	Conditions for when to use the EVAM view configuration.
Table Fields	Table fields to display on the EVAM view configuration. For example: `name,supplier,description,product_category`
Custom Fields	Custom fields to display on the EVAM view configuration. This is a comma-separated list of non-table fields that are required for the template. For example: `price,image_url,delivery_label,delivery_date,product_url`

4. Select **Save**.
5. Create an M2M action assignment or select **Link Existing** and then select the Declarative Action **navigation**.
   For more details, see, View configurations, view templates, and configuration bundles for EVAM.

Related topics

Configure dynamic related records

Configure related record definitions

Configure the app route to use an existing subpage

Create an app route to make an existing page a part of the page collection. For example, the dynamic related record is a global subpage that you can use at any application level.

Before you begin

Role required: admin

About this task

Configuring an app route enables you to utilize an existing page in a page collection. This is applicable to both page templates and page variants.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Select the **Page collection** tab and then select **CSM default record pre-tabs** from the Page Collections list.
3. In the CSM default record pre-tabs page, select **View page collection settings** in the upper right corner.
4. In the General section, select **Open page collection**.
   The system opens the UX Extension Point page for CSM default record pre-tabs.
5. Navigate to the **UX App Routes** related list.
6. Select **New** to create an app route.
7. Enter a name In the **Name** field, a route in the **Route** field, and then select the **Screen Collection** that you want to reuse.

   The route is the path that the system uses to reach the page collection. For example, some common routes in CRM Workspace include record, list, and create_case_type for the Create Case modal.

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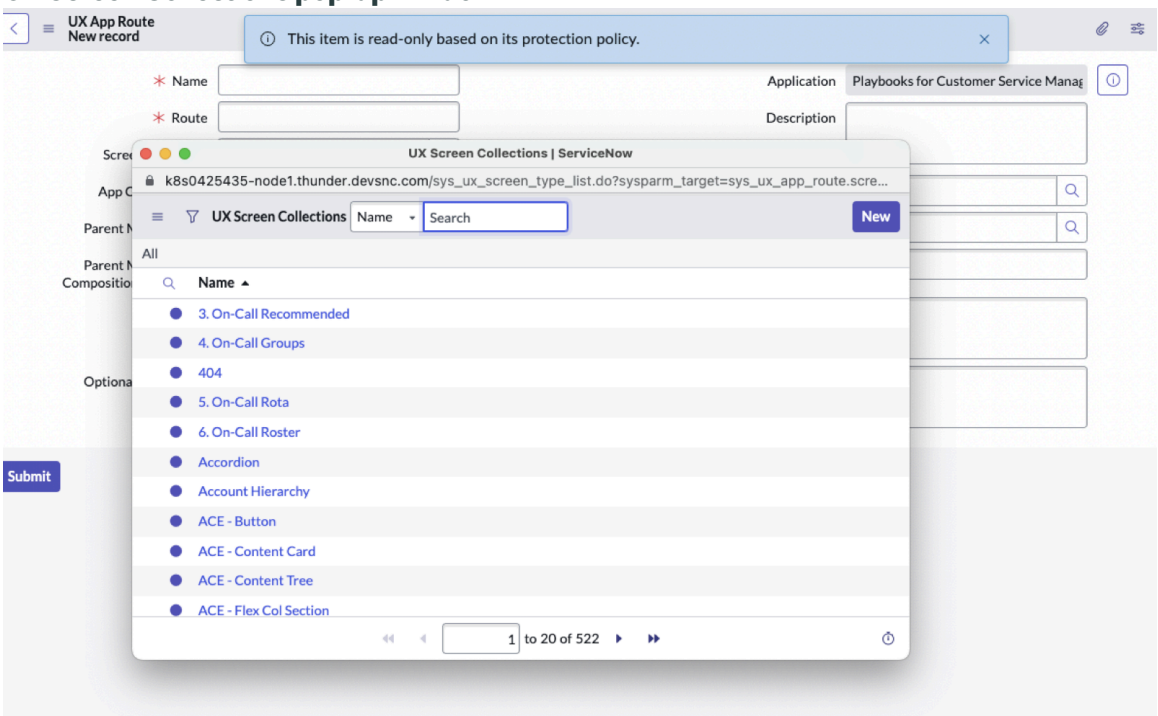
You can also create a screen collection by selecting **New** on the UX Screen Collections pop-up window and entering the name, route, and screen collection.

UX Screen Collections pop-up window



8. Select **Submit** to create the app route.

Result

The system adds the subpage to the page collection.

Playbook applications

Several playbook applications are available that provide playbooks to onboard customers, manage customer complaints, and resolve issues.

Customer Service Management playbook applications

Application	Description
Case Playbook for Onboarding	Use this application to manage the process for taking on new customers or enrolling customers in new products. An onboarding case captures the details of the new customer, including their selection of products and services.
Case Playbook for Complaints	Use this application to manage the process for handling customer complaints. A complaint case captures the details of the problem reported by the customer and the expected resolution.
Case Playbook for Product Support	Use this application to guide agents through the steps that are needed to resolve product issues. A product support case captures

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Customer Service Management playbook applications (continued)

Application	Description
	information about the customer, the product, and the reported issue.

Case Playbook for Onboarding

Use the Case Playbook for Onboarding to manage the process for taking on new customers or enrolling customers for new products.

The onboarding playbook provides the activities and tasks that agents can perform during the onboarding process. Agents can also create and assign tasks as needed and use the playbook to communicate with the customer.

Use the Case Playbook for Onboarding for cases that were created by using the onboarding case type. This playbook is available for both CRM Workspace and CSM Agent Workspace. In the CSM workspaces, the playbook appears in the **Playbook** tab on the case record.

Note: If you have the admin role, you can configure a playbook to use compact mode in CRM Workspace. Use the compact mode to move the playbook from a tab in the workspace to a tab in the contextual side panel.

Case Playbook for Onboarding application

The Case Playbook for Onboarding application (com.sn_csm_onboarding_caseflow) is available from the ServiceNow® Store. For more information, see Playbook plugins.

Case Playbook for onboarding a PAD process definition

The Case Playbook for Onboarding 3.0 includes a new Process Automation Designer (PAD) process definition called **onboarding_playbook_v1**. This process definition contains the optimized stages and activities for the onboarding playbook.

Process definitions are stored in the Process Definitions table (sys_pd_process_definition). As an admin, you can view a list of processes by doing the following task:

1. In the application navigator, enter **sys_pd_process_definition.list**.
2. Configure the list to show the **Name** field.

Only one PAD process per playbook can be active at a time.

Case Playbook for Onboarding features

The Case Playbook for Onboarding 3.0 includes the case features and workspace enhancements that are listed in the following table.

Onboarding Case Playbook 3.0 features

Feature	Description
Create an onboarding case using the Case Playbook for Onboarding	Feature that opens the onboarding playbook and initiates the first activity in the Initiate stage, which is gathering the customer information. The agent can complete and save this activity to create the record.

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Onboarding Case Playbook 3.0 features (continued)

Feature	Description
	For more information, see Create a record using a playbook.
Focused activity view	Feature that determines how the stages and activities appear in the playbook. The Case Playbook for Onboarding uses the Focused activity view, which enables agents to see • The end-to-end life cycle of the onboarding workflow in the playbook life-cycle panel. • The current stage is expanded and the current activity is highlighted within the playbook life-cycle panel. • The current activity that is displayed in the playbook work area.
Contextual side panel	Feature that displays the following information: • Activity stream • Ribbon information, such as the case overview, customer details, timeline, and SLAs • Dynamic related records The activity stream and ribbon information are available in CRM Workspace only. For more information about using the contextual side panel, see the following topics: • Using activity stream in the contextual side panel • Viewing the ribbon information in the contextual side panel • Viewing dynamic related records in the contextual side panel
Activity visibility	Feature that enables you to control the activity visibility: • Hide the activities in a stage that the logged-in user can't access. • Hide the pending activities in a stage. For more information about configuring this feature, see Configure playbook stage and activity visibility.

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Onboarding Case Playbook 3.0 features (continued)

Feature	Description
Compact mode	Mode that moves the playbook from a tab in the workspace to the contextual side panel. Agents can complete the playbook activities in the side panel while they are viewing the other tabs in the record page. This mode is available in CRM Workspace only. Users with the admin role can configure a playbook to use compact mode in the playbook component configuration in UI Builder.
Dynamic related records	Feature that displays the records in the contextual side panel. These records dynamically change based on the context of the current record or playbook activity. From the **Related Records** tab in the contextual side panel, agents can • Filter the list of related records • Open the list in a new tab • Create new records The dynamic related records feature is available in CRM Workspace only. For more information, see Viewing related records in the contextual side panel.
SLA widget	Activity cards in the playbook work area that can display an SLA widget. The widget appears on the activity card when the playbook activity has an SLA. The widget includes the activities in the following stages: • Pre-approval (duration is 3 days) • Data capture (duration is 5 days) • Due diligence (duration is 15 days) • Resolution (duration is 20 days) The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75%

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Onboarding Case Playbook 3.0 features (continued)

Feature	Description
	• Orange: 75–99% • Red: 100% or breached

Using the playbook stage and activity pickers to navigate the stages and activities

The playbook stage picker enables agents to see the entire onboarding workflow. Agents can navigate the playbook stages and activities by doing the following tasks:

- Expand and collapse the stages to show or hide the activities.
- Use the filter in the stage picker to filter activities by the assigned user or the activity state.
- Click an activity to display the details in the playbook work area.

Using the Playbook Actions menu

The Playbook Actions menu in the playbook header includes the actions that agents can perform at the playbook and activity levels. The agents can select the Playbook Actions icon (⋮) to access this menu.

The Playbook Actions menu includes the following playbook-level actions:

- **Expand All Stages**: Expands all the stages in the playbook.
- **Collapse All Stages**: Collapses all the stages in the playbook.
- **Request Info**: Displays a pop-up window that the agent can use to communicate with the customer and to request information about a case or case task. This action also saves the details to the case or case task activity stream. By using this action, the state of the case or case task changes to Awaiting Info and pauses the SLAs and any timers.
- **Info Received**: Returns the case or case task to the previous state and restarts the SLAs and any timers.

Note: The **Request Info** and **Info Received** actions can also be configured to appear on the case task activity cards.

The activity-level actions can vary depending on the type of activity and in which stage it appears. For example, actions are available to accept cases, create related cases, create case tasks, and propose solutions.

Onboarding playbook stages and activities

The following table lists the Case Playbook for Onboarding stages and activities that agents can use to onboard new customers or products.

Playbook activities by onboarding stage

Stage	Activity	Activity Details
Initiate Guides the agent in collecting customer	Collect customer information	When an agent creates an onboarding case, the workspace opens the Create New Onboarding Case form, launches the

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
and case information and sending a case for pre-approval.		onboarding playbook, and uses the first activity to gather customer information. The agent enters the information about the channel, account, contact, consumer, product, and service. For more information about the products and services, see Service definitions. Agent actions: **Continue**: Creates the onboarding case and adds the case number to the record tab. It also marks the first activity as complete and moves to the second activity.
	Add additional members	Activity that agents can use to add additional members to the onboarding case: **1.** Select **Add new** to open the Create New Related Party form in a new tab. **2.** In the **Type** field, select the related party with the correct entity type, such as a beneficiary who is a customer contact. **3.** Select the **User**. **4.** Select **Save** to add the user to the Member Information list on the activity card. Agent actions: • **Assign to me**: Available if the case is not yet assigned. Assigns the case to the logged-in user. • **Add new**: Adds a user to the Member Information list. • **Send for Pre Approval**: Completes the Initiate stage and moves to the Pre-approval stage.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Initiate stage.
Pre approval	Check approval status	Activity that includes a list of approvals and approvers.

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
Automates the pre-approval process for the customer.		**Note:** This activity shows the list of approvals if an approval workflow is manually configured for an onboarding case. The approval workflow configuration is not provided in the base system. If no approval workflow is configured, this activity completes automatically.
	Update customer information	Agents can use this activity to verify the account, contact, or consumer information for the onboarding case. Agent actions: **Save**: Saves any changes made to the customer information.
	Complete pre approval	Agents can use this activity to provide additional information and add notes or attachments. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Initiate Data Capture**: Marks the activity and the Pre approval stage as complete.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Pre approval stage.
Data capture Organizes the collection of customer information.	Verify document checklist	This activity displays a document checklist. Agents can check off the necessary documents and provide comments or work notes. If the customer type changes after the case is created, a new checklist of the appropriate type replaces the original checklist. Agent actions:

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
		• **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Submit for Review**: Marks the activity and the Data capture stage as complete.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Data capture stage.
Due diligence Displays case tasks for completing due diligence.	Perform background check	Agents can use this activity to perform background checks on the customer. Agent actions: • **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review Complete**: Marks the activity as complete.
	Initiate legal verification	Agents can use this activity to initiate the legal verification process for a customer. Agent actions: • **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review Complete**: Marks the activity as complete.
	Review credit history	Activity that the agents can use to review a customer's credit history. Agent actions: • **Request info**: Request additional information from the customer. This action changes the state of the case task to Awaiting Info.

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Playbook activities by onboarding stage (continued)

Stage	Activity	Activity Details
		• **Post**: Posts the comment or the work note to the case task record activity stream. • **Review Complete**: Marks the activity and the Due Diligence stage as complete.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Due Diligence stage.
Resolve Manages the case resolution activities.	Propose resolution	Activity that displays the fields from the Resolution Notes section on the Case form. Agents can add the resolution details and select **Propose solution**. If the customer rejects the resolution, the agent can return to the Resolve stage and propose another solution. Agent actions: • **Propose solution**: Propose the solution to the customer and mark the Resolve stage as complete. • **Change solution**: This action appears after the agent proposes a solution.
	Notify customer	This activity displays the details of the email that was automatically sent to the customer at the completion of the Resolve stage.
Close Manages the case close activities.	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Close stage.
	Close case	When the customer accepts the resolution, the Resolve stage completes and the Close stage is also marked as complete.

Process-based page variant for onboarding case type

The Case Playbook for Onboarding v5.0 application includes a process-based page variant that you can activate and use with the onboarding case type in CRM Workspace. This page includes the following features:

- Horizontal stage picker in the record that provides an end-to-end view of the onboarding process.
- Related list tabs that are displayed in the Dynamic Related Records component in the contextual side panel.
- Persistent account and contact information that display in the panel.
- Displays **Email** tab in the **Activity Stream**.

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- Email templates that are displayed in the contextual side panel.
- Customization of the start and end states of the approval flow as fields in the Approval request activity.

Agents can create tasks as needed and view and update the case details. For more information, see Playbook pages.

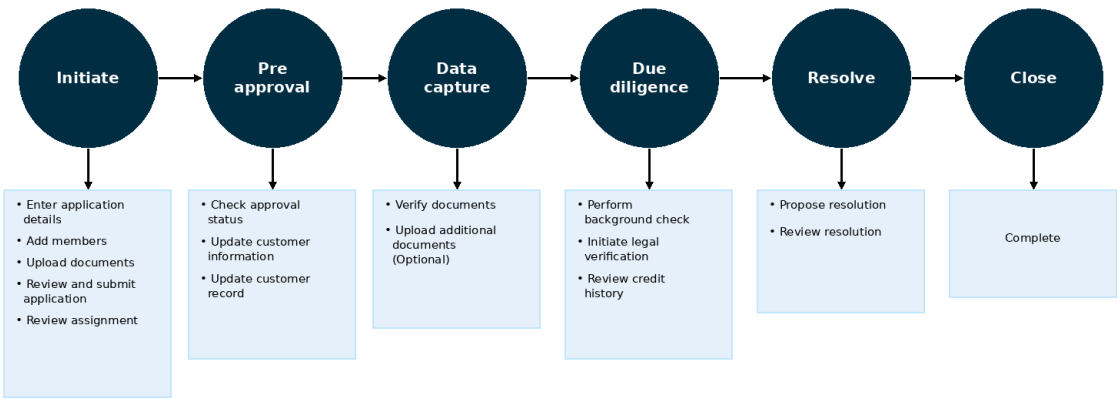
Guided Playbook for Onboarding Request

The Case Playbook for onboarding has undergone modifications in Playbooks for Portals to expose the initiate stage for self-service. This change will provide the guided playbook intake process to end customers as well, previously available only to agents. The experience is initially shipped as inactive to customers.

End customers now have visibility into the entire lifecycle of the onboarding application when viewing the case application. They can perform various tasks based on the specific stage of the case lifecycle. This includes submitting new cases, checking the status of existing cases, and taking actions on tasks that require customer input as the case progresses.

Contributor users, on the other hand, have the ability to submit cases and act on tasks on behalf of the customer. During the initiate stage of the onboarding case type, end customers have the option to save their progress. Additionally, they can view the case process on the case ticket page specifically designed for onboarding cases. The flows within the system guide users through the step-by-step completion of both simple and complex processes, ensuring a smooth and efficient experience.

Guided Playbook for Onboarding Request



As customer, you can:

- Locate the catalog content item 'New Guided Onboarding Request' under the 'Support' category in the service catalog.
- Launch the playbook record generator associated with the selected content item.
- Monitor your progress in the submission process, including the number of remaining steps and the ability to navigate back to previous steps when viewing a playbook.
- Easily populate the required fields with the options provided and input controls.
- Save an application or form before it is ready for submission and resume working on it at a later time.
- Locate the draft case from the case list view to continue where you left off.
- Click **Submit** to complete the initiation stage during the **Review Application**step.

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- Receive a notification if there are any pending tasks due to missing documents.
- Access the case ticket page directly from the email notification, with the process tab open, displaying the **Data Capture** stage and the **Upload Documents** activity.

Known limitations:

- If you switch to the new Process Automation Designer (PAD) with the existing service definition and the old record generator, you may encounter a configuration error page when attempting to create onboarding from the case type selector. You need to update the service definition's references as well to the new record generator.
- The Portal playbook experience only supports the New PAD. Customers may encounter issues if they attempt to use the old PAD, so it is recommended not to use it. Ensure that only one PAD is active at a given time.

Case Playbook for Complaints

Use the Case Playbook for Complaints to guide agents through the steps that are needed to resolve customer complaints.

A complaint case captures the information about the customer, the product, and the details about the complaint. The complaint playbook provides the activities and tasks that agents can perform to research and resolve the complaint. Agents can also create and assign tasks as needed and use the playbook to communicate with the customer.

The Case Playbook for Complaints can be used with cases that are created using the complaint case type. This playbook is available for both CRM Workspace and CSM Agent Workspace. In the CSM workspaces, the playbook appears in the **Playbook** tab on the case record.

Note: If you have the admin role, you can configure a playbook to use the compact mode in CRM Workspace. Use the compact mode to move the playbook from a tab in the workspace to a tab in the contextual side panel.

Case Playbook for Complaints application

The Case Playbook for Complaints 3.0 application (com.sn_csm_complaint_caseflow) is available from the ServiceNow® Store. For more information, see Playbook plugins.

Case Playbook for Complaints PAD process definition

The Case Playbook for Complaints 3.0 includes a new Process Automation Designer (PAD) process definition called **complaint_playbook_v1**. This process definition contains the optimized stages and activities for the complaint playbook.

The process definitions are stored in the Process Definitions table (sys_pd_process_definition). To view a list of processes, do the following task:

1. In the application navigator, enter **sys_pd_process_definition.list** in the application navigator.
2. Configure the list to show the **Name** field.

Only one PAD process per playbook can be active at a time. .

Case Playbook for Complaints features

The Case Playbook for Complaints 3.0 includes the case features and enhancements that are listed in the following table.

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Case Playbook for Complaints 3.0 features

Feature	Description
Create a complaint case using the Case Playbook for Complaints	Feature that opens the complaint playbook and initiates the first activity in the Intake stage, which is gathering complaint details. The agent can complete and save this activity to create the record. For more information, see Create a record using a playbook.
Focused activity view	Feature that determines how the stages and activities appear in the playbook. The Case Playbook for Complaints uses the Focused activity view, which enables agents to see • The end-to-end life cycle of the complaint workflow in the playbook life-cycle panel. • The current stage is expanded and the current activity is highlighted within the playbook life-cycle panel. • The details of the current activity that is displayed in the playbook work area.
Contextual side panel	Feature that displays the following information in the contextual side panel: • Activity stream • Ribbon information, such as the case overview, customer details, timeline, and SLAs • Dynamic related records **Note:** The activity stream and ribbon information are available in CRM Workspace only. For more information about using the contextual side panel, see • Using activity stream in the contextual side panel • Viewing the ribbon information in the contextual side panel • Viewing dynamic related records in the contextual side panel
Activity visibility	Feature that uses the following settings to control activity visibility:

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Case Playbook for Complaints 3.0 features (continued)

Feature	Description
	• Hide the activities in a stage that the logged-in user can't access. • Hide the pending activities in a stage. For more information about configuring this feature, see Configure playbook stage and activity visibility.
Compact mode	Mode that moves the playbook from a tab in the workspace to the contextual side panel. Agents can complete the playbook activities in the side panel while they're viewing the other tabs in the record page. **Note:** This mode is available in CRM Workspace only. Users with the admin role can configure a playbook to use the compact mode in the playbook component configuration in UI Builder.
Dynamic related records	Feature that displays the records in the contextual side panel. These records dynamically change based on the context of the current record or playbook activity. From the **Related Records** tab in the contextual side panel, agents can • Filter the list of related records • Open the list in a new tab • Create records **Note:** The dynamic related records feature is available in CRM Workspace only. For more information, see Viewing related records in the contextual side panel.
SLA widget	Activity cards in the playbook work area that can display an SLA widget. The widget appears on the activity card when the playbook activity has an SLA. This widget includes the activities in the following stages: • Triage • Research • Respond

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Case Playbook for Complaints 3.0 features (continued)

Feature	Description
	The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75% • Orange: 75–99% • Red: 100% or breached

Using the playbook stage and activity pickers to navigate stages and activities

The playbook stage picker enables agents to see the entire complaint workflow. Agents can navigate the playbook stages and activities by doing the following tasks:

- Expand and collapse stages to show or hide activities.
- Use the filter in the stage picker to filter activities by the assigned user or the activity state.
- Select an activity to display the details in the activity viewer.

Using the Playbook Actions menu

The Playbook Actions menu in the playbook header includes the actions that agents can perform at the playbook and activity levels. The agents can select the Playbook Actions icon (⋮) to access this menu.

The Playbook Actions menu includes the following playbook-level actions:

- **Expand All Stages**: Expands all the stages in the playbook.
- **Collapse All Stages**: Collapses all the stages in the playbook.
- **Request Info**: Displays a pop-up window that the agent can use to communicate with the customer and to request information about a case or case task. This action also saves the details to the case or case task activity stream. By using this action, the state of the case or case task changes to Awaiting Info and pauses the SLAs and any timers.
- **Info Received**: Returns the case or case task to the previous state and restarts the SLAs and any timers.

Note: The **Request Info** and **Info Received** actions can also be configured to appear on case task activity cards.

The activity-level actions can vary depending on the type of activity and in which stage it appears. For example, actions are available to accept cases, create related cases, create case tasks, and propose solutions.

Complaint playbook stages and activities

The following table lists the Case Playbook for Complaints stages and activities that agents can use to resolve customer issues.

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Case Playbook for Complaints stages and activities

Stage	Activity	Activity Details
Intake Guides the agent to collect the information needed to create the complaint case.	Gather complaint details	When an agent creates a complaint case, the workspace opens the Create New Complaint Case form, launches the complaint playbook, and uses the first activity to gather complaint details. The agent can enter the information about the customer, the service, the complaint, and the expected outcome for the case. As the agent enters the complaint details, additional fields appear on the activity card such as the **Category** and **Subcategory** fields. **Note:** For more information about the service, see Service definitions. Agent actions: **Continue**: Creates the complaint case and adds the case number to the **Record** tab. It also marks the first activity as complete and moves to the second activity.
	Add involved parties	Activity that the agent can use to add involved parties to the complaint case: 1. Select **Add new** to open the Create New Related Party form in a new tab. 2. In the **Type** field, select the related party with the correct entity type, such as a co-complainant who is a customer contact. 3. Select **User**. 4. Select **Save** to add the user to the Involved Parties list on the activity card. Agent actions: • **Assign to me**: Available if the case isn't yet assigned. Assigns the case to the logged-in user. • **Add new**: Adds a user to the Involved Parties list (see the previous steps).
	Verify primary address	Activity that shows the fields from the Primary Correspondence Address form section on the **Details** tab. Agents can accept this address or select a different address. Agent actions:

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
		• **Save**: Saves the updates to the Primary Correspondence Address fields. • **Move to triage**: Completes the Intake stage, marks the activities in the stage as complete, and moves to the next stage in the complaint playbook.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Intake stage.
Triage Enables the agent to do the initial troubleshooting on the case.	Verify complaint	Case task that agents can use to review any available related search results in the contextual side panel and add notes or attachments. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Submit for review**: Marks the case task and the Triage stage as complete.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Triage stage.
Research Orchestrates sending the case to different back-office teams for follow-up.	Review legal implications	Case task that agents can assign to a different user for legal review. To assign the task: **1.** Select the View Task icon in the activity card. This action opens the case task in a new tab. **2.** Select the user in the **Assigned to** field. **3.** Add information to the other fields on the Case Task form as needed and select **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info.

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
		• **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task as complete.
	Product owner review for other similar issues	Case task that an agent can assign to a different user for a review of similar issues. To assign the task: **1.** Select the View Task icon in the activity card to open the case task in a new tab. **2.** Select the user in the **Assigned to** field. **3.** Add information to the other fields on the Case Task form as needed and click **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task as complete.
	Verify check entitlement	Case task that an agent can assign to a different user for an entitlement review. To assign the task: **1.** Select the View Task icon in the activity card to open the case task in a new tab. **2.** Select the user in the **Assigned to** field. **3.** Add information to the other fields on the Case Task form as needed and select **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task as complete.

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
	Billing review for any refunds	Case task that an agent can assign to a different user for a billing review. To assign the task: **1.** Select the View Task icon in the activity card to open the case task in a new tab. **2.** Select the user in the **Assigned to** field. **3.** Add information to the other fields on the Case Task form as needed and select **Save**. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task and the Research stage as complete.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Research stage.
Respond Guides the agent in drafting a response to the case.	Compose email	Activity that the agent can use to communicate with the customer. Agent actions: • **Request info**: Requests additional information from the customer. This action changes the state of the case task to Awaiting Info. • **Post**: Posts the comment or the work note to the case task record activity stream. • **Review complete**: Marks the case task and the Respond stage as complete.
Resolve Manages the activities for case resolution.	Propose resolution	Activity that shows the fields from the Resolution Notes section on the Case form. An agent can add the resolution details and select **Propose solution**. If the customer rejects the solution, the agent can return to the Resolve stage and propose another solution. Agent actions:

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Case Playbook for Complaints stages and activities (continued)

Stage	Activity	Activity Details
		• **Propose solution**: Proposes the solution to the customer and marks the Resolve stage as complete. • **Change solution**: This action appears after the agent proposes a solution.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Resolve stage.
Close Manages the activities for closing the case and sending a survey to the customer.	Close case	When the customer accepts the resolution, the Resolve stage completes and the Close stage is also marked as complete.
	Notify customer	Activity that displays the details of the email that was automatically sent to the customer at the completion of the Close stage.

Process-based page variant for complaint case type

The Case Playbook for Complaints v5.0 application includes a process-based page variant that you can activate and use with the complaint case type in CRM Workspace. This page includes the following features:

- Horizontal stage picker in the record that provides an end-to-end view of the complaint process.
- Related list tabs that are displayed in the Dynamic Related Records component in the contextual side panel.
- Persistent account and contact information that is displayed in the panel.
- **Email** tab that is displayed in the **Activity Stream**.
- Email templates that are displayed in the contextual side panel.
- Customization of the start and end states of the approval flow as fields in the Approval request activity.

Agents can create tasks as needed as well as view and update case details. For more information, see Playbook pages.

Case Playbook for Product Support

Use the Case Playbook for Product Support to guide agents through the steps that are needed to resolve product issues.

A product support case captures the information about the customer, the product, and the reported issue. The product support playbook provides the activities and tasks that agents can perform to research and resolve the issue. Agents can also create and assign tasks as needed and use the playbook to communicate with the customer.

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The Case Playbook for Product Support is available for both CRM Workspace and CSM Agent Workspace. In the CSM workspaces, the playbook appears in the **Playbook** tab on the case record.

Note: If you have the admin role, you can configure a playbook to use the compact mode in CRM Workspace. Use the compact mode to move the playbook from a tab in the workspace to a tab in the contextual side panel.

Case Playbook for Product Support application

The Case Playbook for Product Support 3.0 application (com.sn_csm_product_caseflow) is available from the ServiceNow® Store. For more information, see Playbook plugins.

Case Playbook for Product Support PAD process definition

The Case Playbook for Product Support 3.0 includes a new Process Automation Designer (PAD) process definition called **product_playbook_v1**. This process definition contains the optimized stages and activities for the product support playbook.

The process definitions are stored in the Process Definitions table (sys_pd_process_definition). To view a list of processes, you can do the following task:

1. In the application navigator, enter **sys_pd_process_definition.list**.
2. Configure the list to show the **Name** field.

Only one PAD process per playbook can be active at a time.

Case Playbook for Product Support features

The Case Playbook for Product Support 3.0 includes the case features and enhancements that are listed in the following table.

Case Playbook for Product Support features

Feature	Description
Focused activity view	Feature that determines how the stages and activities appear in the playbook. The Case Playbook for Product Support uses the Focused activity view, which enables agents to see • The end-to-end life cycle of the product support workflow in the playbook life-cycle panel. • The current stage is expanded and the current activity is highlighted within the playbook life-cycle panel. • Details of the current activity that is displayed in the playbook work area.
Contextual side panel	Feature that displays the following information in the contextual side panel:

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Case Playbook for Product Support features (continued)

Feature	Description
	• Activity stream • Ribbon information, such as the case overview, customer details, timeline, and SLAs • Dynamic related records **Note:** The activity stream and ribbon information are available in CRM Workspace only. For more information about using the contextual side panel, see • Using activity stream in the contextual side panel • Viewing the ribbon information in the contextual side panel • Viewing dynamic related records in the contextual side panel For more information about configuring this feature, see Configure playbook stage and activity visibility.
Activity visibility	Feature that uses the following settings to control the activity visibility: • Hide the activities in a stage that the logged-in user can't access. • Hide the pending activities in a stage.
Compact mode	Mode that moves the playbook from a tab in the workspace to the contextual side panel. Agents can complete the playbook activities in the side panel while they're viewing the other tabs in the record page. **Note:** This mode is available in CRM Workspace only. Users with the admin role can configure a playbook to use the compact mode in the playbook component configuration in UI Builder.
Dynamic related records	Feature that displays the records in the contextual side panel. These records dynamically change based on the context of the current record or playbook activity.

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Case Playbook for Product Support features (continued)

Feature	Description
	From the **Related Records** tab in the contextual side panel, agents can • Filter the list of related records • Open the list in a new tab • Create new records **Note:** The dynamic related records feature is available in CRM Workspace only. For more information, see Viewing related records in the contextual side panel.
SLA widget	Activity cards in the playbook work area can display an SLA widget. The widget appears on the activity card when the playbook activity has an SLA. The color of the widget indicates the time remaining for the SLA: • Green: 0–50% • Yellow: 50–75% • Orange: 75–99% • Red: 100% or breached

Using the playbook stage and activity pickers to navigate stages and activities

The playbook stage picker enables agents to see the entire product support workflow. Agents can navigate the playbook stages and activities by doing the following tasks:

- Expand and collapse the stages to show or hide activities.
- Use the filter in the stage picker to filter activities by the assigned user or the activity state.
- Select an activity to display the details in the playbook work area.

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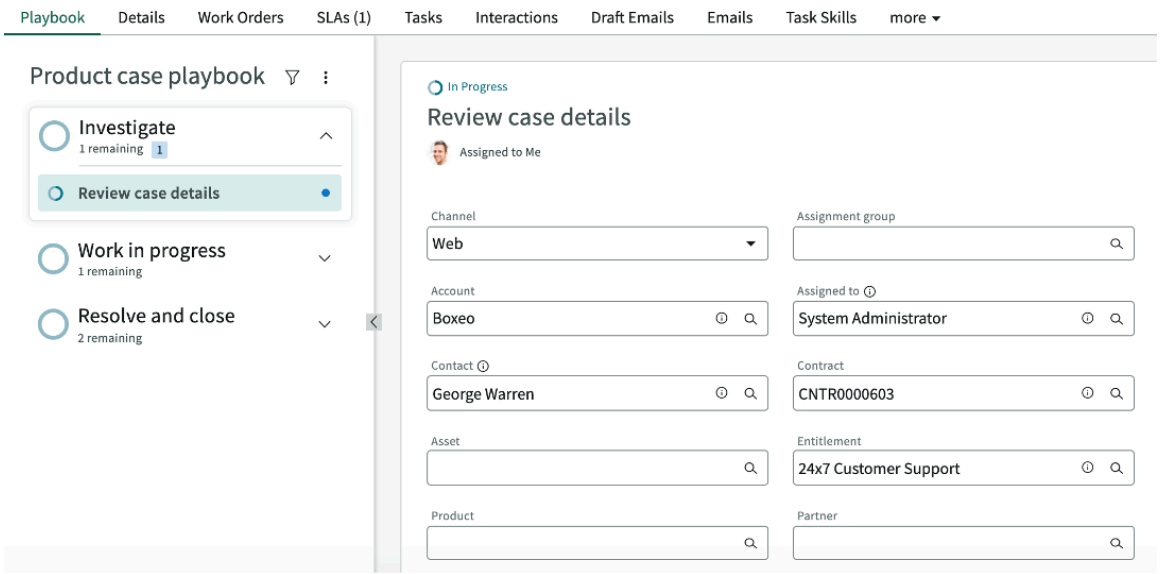
The following example shows the different stages and activities in a playbook.



Using the Playbook Actions menu

The Playbook Actions menu in the playbook header includes the actions that agents can perform at the playbook level. The agents can select the Playbook Actions icon (⋮) to access this menu.

The Playbook Actions menu includes the following playbook-level actions:

- **Expand All Stages**: Expands all the stages in the playbook.
- **Collapse All Stages**: Collapses all the stages in the playbook.
- **Request Info**: Displays a pop-up window that the agent can use to communicate with the customer. This action also saves the details to the case activity stream. By using this action, the state of the case changes to Awaiting Info and pauses the SLAs and any timers on the case.
- **Info Received**: Returns the case to the previous state and restarts the SLAs and any timers on the case.

The activity-level actions can also appear in the Playbook Actions menu. These actions vary depending on the type of activity and in which stage it appears. For example, actions are available to accept cases, create related cases, create case tasks, and propose solutions.

Case Playbook for Product Support stages and activities

The following table lists the Case Playbook for Product Support stages and activities that agents can use to resolve customer issues.

Case Playbook for Product Support stages and activities

Stage	Activity	Details
Investigate Guides the agent in collecting customer information and performing some	Review case details	A case is in the Investigate stage when the case state is New or Open. This activity displays information about the case, including the customer and product details and any contracts or entitlements.

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Case Playbook for Product Support stages and activities (continued)

Stage	Activity	Details
initial research about the product issue.		The agent can add details about the issue and review the information and related search results, such as knowledge articles or similar cases. Agent actions: • **Assign to me**: Assigns the case to the current agent. • **Accept**: Enables the agent to accept the case. • **Save**: Saves any changes made to the case details. • **Mark Complete**: Saves the information, marks the activity as complete, and moves to the next activity or stage.
Work in progress Create case tasks as needed and assign tasks to users.	Create case tasks	A case is in the Work in progress stage when the agent completes the initial research and begins working on the issue. This activity includes a list of case tasks. Agents can create tasks as needed to complete the work for a case. Agent actions: • **Add New**: Creates a case task. Add information to the task and select **Save** to add the task to the Case Tasks list. • **Mark Complete**: Marks the activity as complete and moves to the next activity or stage.
Resolve and close Case tasks are complete and the agent is ready to propose a solution to the customer.	Resolve	Add details to the **Resolution code** and **Resolution notes** fields on the activity card and select **Save**. This information is added to the case record. Agent actions: • **Propose Solution**: Notifies the customer of the proposed solution. • **Change Solution**: Appears after the agent proposes a solution. Use this action to add information to the case resolution fields.
	Close case	This activity shows the following read-only fields: • **Closed by**: the agent who closed the case. • **Closed**: the date and time that the case was closed.

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Case Playbook for Product Support stages and activities (continued)

Stage	Activity	Details
		The system closes the case when the customer accepts the resolution or when the agent selects **Close Case**.

Process-based page variant for cases

The Case Playbook for Product Support v5.0 application includes a process-based page variant that you can activate and use with cases in CRM Workspace. This page includes the following features:

- A horizontal stage picker at the top of the record that provides an end-to-end view of the complaint process. Activities within each stage are stacked in the activity viewer.
- Displays the related list tabs in the Dynamic Related Records component in the contextual side panel.
- Displays persistent account and contact information in the left side panel.
- Displays **Email** tab in the **Activity Stream**.
- Displays the email templates in the contextual side panel.
- Supports case summarization card on the left panel.

Agents can create tasks as needed as well as view and update case details. For more information, see Playbook pages.

Configure Playbooks for Customer Service Management

Configure different playbook settings, such as selecting the activity view and determining activity visibility.

Some of the configuration for a playbook is performed in UI Builder as part of the playbook component configuration. Additional settings can be configured in the playbook experience configuration record. These settings include selecting the playbook activity view and configuring playbook stage and activity visibility.

Playbook configuration tasks

Configuration task	Description
Create or customize a playbook record page	A record page provides the base structure for how a record is displayed in CRM Workspace. The following playbook record pages are available with the Playbooks for Customer Service Management application [com.sn_csm_playbook]: • Case playbook: horizontal stages page • Case playbook: vertical stages page For more information, see Manage UI Builder pages and page variants.
Configure the playbook record page settings	Each UI Builder record page includes the following settings:

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Playbook configuration tasks (continued)

Configuration task	Description
	• **Active**: Enabling this check box makes the page available to the selected audience. • **Order**: This value indicates the page priority. The page with the lowest order value is the default page. • **Conditions**: Determine when a page variant is displayed. • **Audience**: Determines who can see the page. For more information, see the following topics: • Case playbook: horizontal stages page variant settings • Case playbook: vertical stages page variant settings
Select a playbook activity view	The activity view determines how the stages and activities are displayed in the playbook. • **Stacked**: <add description> • **Focused**: <add description> Users with the system administrator role can select a playbook activity view in the playbook component configuration in UI Builder.
Configure playbook stage and activity visibility	The following fields control the visibility of playbook stages and activities. • **Hide Inaccessible Activity**: Accessibility is determined by user permissions. When enabled, the user cannot see an activity if they do not have permissions to view the data associated with the activity. If all activities in a stage are inaccessible to the user, the stage is also hidden. • **Control Activity Display**: Pending activities are those activities that have not yet been triggered. Select one of the options in this field to show or hide pending activities. Users with the system administrator role can in the playbook experience configuration record.
Configure a playbook to use compact mode	Compact mode moves the playbook from a tab in the workspace to the contextual side panel. Agents can complete playbook activities in the side panel while viewing other tabs in the record page. Users with the system administrator role can configure a playbook to use compact mode in the playbook component configuration in UI Builder.
Preview a playbook	Users with the playbook experience admin role [playbook_experience.admin] can preview a playbook in real time within a non-production environment. With this feature, playbook experience administrators can easily see and test different playbook settings.

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Playbook configuration tasks (continued)

Configuration task	Description
Select a playbook experience	A playbook experience is a defined set of configurations that determines how the system renders a playbook in workspace. You can use playbook experiences to customize the look and feel of a playbook, map user actions, and override activities. The Playbook Experience plugin (com.playbook_experience) includes the Global Playbook Experience record, which defines a default playbook configuration. The Playbooks for Customer Service Management plugin (com.sn_csm_playbook) includes the following additional playbook experience records: • CRM Workspace Playbook • CSM Agent Workspace Playbook Users with the system administrator role can select a playbook experience when adding a playbook to a page in UI Builder. Different playbooks for the same record type can use different playbook experiences. For example, if a complaint case uses two playbooks, each playbook can use a different playbook experience.
Set up a record generator for a case type	Create a record for a case type by using a playbook record generator. With a record generator, the system creates a record as the first step in the playbook.
Configure an optional activity for a playbook	Configure optional playbook activities so that agents and fulfillers can insert activities during a playbook run. For example, a customer may want to schedule an optional activity such as making an appointment to visit a location.

Playbook experiences

Playbook experiences are used to customize the look and feel of a playbook. Settings in a playbook experience control how UI Builder renders a playbook in the CSM workspaces. System administrators can configure settings in the playbook experience record that determine the playbook stage and activity visibility.

Within UI Builder, system administrators can configure playbook component settings such as:

- Selecting a playbook experience
- Selecting an activity view
- Enabling compact mode

For more information, see Configuring playbooks for Customer Service Management.

Select a playbook activity view

The activity view determines how the stages and activities are displayed in the playbook.

Before you begin
Role required: admin

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About this task

Users with the system administrator role can select the playbook activity view in the playbook component configuration in UI Builder.

Procedure

1. Navigate to UI Builder and open the playbook component.
2. Select the playbook component.
3. In the Config tab, select a view in the **Activity View** field.

Choice	Description
Stacked	Displays the stages in the playbook life cycle panel and cards for each of the activities in the current stage in the playbook work area.
Focused	Displays the stages and activities in the play book life cycle panel and the current activity in the playbook work area.

4. Select **Save**.

Configure playbook stage and activity visibility

Configure the visibility of playbook stages and activities that are pending or that a user can't access.

Before you begin

Role required: admin

About this task

Use the following fields in the playbook experience configuration record to control the visibility of playbook stages and activities.

- **Inaccessible Data Visibility**: Accessibility is determined by user permissions. When enabled, the user cannot see an activity if they do not have permissions to view the data associated with the activity. If all activities in a stage are inaccessible to the user, the stage is also hidden.
- **Pending Item Visibility**: Pending activities are those activities that have not yet been triggered. Select one of the options in this field to show or hide pending activities.

Procedure

1. Navigate to **All** > **Playbook Experience** > **Playbook Experiences**.
2. Select a Playbook experience.
3. In the Configurations related list, click the desired configuration.
4. Select **Hide Inaccessible Activity** from the **Inaccessible Data Visibility** field drop-down list to hide the activities in a stage that the logged-in user cannot access.

   The default value for this field is false.
5. In the **Pending Item Visibility** field, select one of the following options.

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Option	Description
Show pending stages and activities	○ Shows all activities in a stage. ○ Pending activities are grayed out. ○ Default setting.
Hide pending activity	○ Hides the pending activities in a stage. ○ If all activities are pending and hidden, the stage is grayed out.
Hide pending activities and stages	○ Hides the pending activities in a stage. ○ If all activities are pending and hidden, the stage is also hidden.

6. Click **Update**.

Related topics

Configure an optional activity for a playbook

Set up a record generator for case type

Create a record for a case type by using a playbook record generator. With a record generator, the system creates a record as the first step in the playbook.

Before you begin

Role required: playbook_experience.admin

About this task

A record generator is set up for a specific table. You can specify the name of the record generator activity, the form view, and the playbook that a user sees before a record is created. You can also configure the declarative action that are used to submit the form. For more information on declarative actions, see Declarative actions.

Procedure

1. Navigate to **All** > **Playbook Experience** > **Record Generators**.
2. Select **New**.
3. Fill in the fields on the form.

Playbook Experience Record Generator form fields

Field	Description
Table	Table that the new record page should use for the record generator entry.
Process Definition	Process definition that you want to display before a record is created. All activities are marked pending. If no process is running after the record is created, a playbook manually triggers this process definition.

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Field	Description
Create Record Activity Name	Name to display on the record generator activity that is inserted as the first step within the specified process definition.
Active	Option to activate the record generator.
Order	Integer that determines the precedence of this configuration in relation to other activities in a Playbook experience. The lower the number means that it's more likely a user selects it over another configuration. Use numbers that are in the hundreds. For example, 100, 200, 300, or 400.
Create Record Form View	Form view for the new record form embedded within the inserted activity.
Template Fields	Optional field values that can be pre-filled in the new record form.

4. Select **Submit**.

Configure an optional activity for a playbook

Configure optional playbook activities so that agents and fulfillers can insert activities during a playbook run. For example, a customer may want to schedule an optional activity such as making an appointment to visit a location.

Before you begin

Role required: playbook_experience.admin

About this task

Configure optional playbook activities in Process Automation Designer (PAD).

Although you can insert global optional activities anywhere in the playbook, you can only insert stage-specific optional activities when a specified stage is active in the playbook. You can also add other global optional activities such as similar records, similar documents, and managed documents.

Note: Some optional activities may require additional plugins. For example, for the Approval Request activity, if the approval action needs to be exposed to the customer via the service portal, you must install the plugin portal store app (com.snc:app-customer-service-portal) release version 23.2.4. To display the activities for the similar and managed documents in PAD, you must install the document management plugin (com.snc.platform_document_management).

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Select the Playbooks tab at the top of the page.
3. Select a playbook from the Label column.
4. See the optional activities under all the stages by turning on the toggle for **Optional activities**.
5. Under **Add activity**, select **Playbook for Customer Service Management** > **Approval Request**. A new approval request optional activity is created.
6. Select the **Approval Request** optional activity.

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7. Under **Edit activity properties**, in the **Details** tab, add a **Label**, **Description**, **Activity Definition**, and set **Start Rule** to **Manual**.
   This setting is the Optional Activity indicator.
8. Save the new activity record.
9. Select **View all properties**.
10. Navigate to **Automation tab** > **parent records** and select the parent record.
11. **Optional:** Go to the **Automation** tab and set the values of the starting state and ending state. The values for the starting and ending states are derived from the value field of the sys_choice table.

    (Optional) To create a custom state flow, see Create a state flow. Ensure that the class of the state flow is "Customer Service Case Flow." You can also configure more declarative actions for the optional activity. For more information, see Creating new declarative action assignments.
12. Select **Done**.
13. Select **Activate**.

Playbooks for Portals

With Customer Service Management (CSM) playbooks on service portals, you get the step-by-step guidance for the case flow process and the contextual information that you need to successfully complete each stage of the flow and its associated activities.

Guided intake with playbooks makes it effortless to fill out a form or provide information for a case. Playbooks offer a clear roadmap that indicates your progress in the submission process and the remaining steps that you need to complete. If needed, you can navigate back to a previous step. You're also presented with the options and input controls that enable you to quickly and accurately input information. Additionally, you can save an application or form that is not yet ready for submission and resume work on it later.

Get started

1. Set up predefined Playbooks for Portals
2. Set up custom Playbooks for Portals
3. View cases in Draft state on the portal
4. Activate a new onboarding playbook with self-service
5. Enable a reflow for your UI Builder pages
6. Using Playbooks for Portals

Set up predefined Playbooks for Portals

Set up predefined Playbooks for Portals to provide end users with the playbook experience on your service portal.

Overview of Playbooks

Playbooks guide users through complex processes and enable them to save their progress and resume their work when convenient. They can also get the information that they need for each stage of the flow and its associated activities with the Customer Service Management (CSM) playbooks on service portals.

You can activate Playbooks for Portals if you have the admin role. The base system is delivered in an inactive state. You must activate it in the Playbooks (PAD) for the user to see it.

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Plugins required:

- Playbooks for Customer Service Management: sn_csm_playbook
- Playbook Experience: sn_playbook_exp
- Case Playbook for Onboarding: sn_onboarding (required if you need the predefined playbook experience)
- Case Playbook for Product Support: sn_product (required if you want to use the product case playbook and record generator)

Plugins are available from the ServiceNow® Store. For more information, see Playbook plugins.

Summary of steps for setting up predefined Playbooks for Portals

You can set up Playbooks for Portals using the following high level steps.

1. Activate the draft state in the onboarding case type state. For more information, see Activate the draft state for the onboarding case type.
2. Activate the record generator
3. Activate a new onboarding playbook with self-service
4. Activate guided onboarding in the playbook content items. For more information, see Activate guided onboarding in Playbook content items.
5. Add a **Process** tab to the Portal so that users can see where they are in the Playbook process. See Add the Process tab to the portal for more information.

Activate the draft state for the onboarding case type

Activate a draft state for the onboarding case type so that the case remains in the draft state during the intake stage until the case is submitted.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **sys_choice.list**.
2. Select the record with **Table name** - **sn_onboarding_case** with the **Element** field value as **state**, and the **Label** field name as **Draft**.
3. Select **Edit**.
4. Clear the **Inactive** check box.
5. Select **Update**.
6. Navigate to **System Definition** > **Scheduled Job** and search for **sys_id** - **ba5ba3d8944e7110f87759453e4c7084** or **Name** - **Update My Lists URL for draft cases**.
7. Select **Execute Now**.
   This action excludes the Draft cases from the list filter on the **My List** tab during the initial page load.
8. **Optional:** If you're using a custom case type table and you do not see the relevant state upon filtering, you might have to assign requisite ACLs for the state field and its associated values.

Activate the record generator

Activate the record generator to the portal case and display the new guided playbook to the user. Portal users can navigate through the playbook steps to complete the case intake.

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Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Playbook Experience** > **Record Generators**.
2. In the list, select the **Table name** - **sn_onboarding_case** with **Process Definition** name - **Onboarding with Self-Service**.
3. Select **Edit**.
4. Select the **Active** check box.
5. Select **Update**.

Activate a new onboarding playbook with self-service

Activate a new onboarding playbook with self-service in Playbooks (PAD) to ensure that the new playbook is visible.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Process Automation Designer**.
2. On the Processes tab, select the label **Onboarding with Self-Service**.
3. From the More actions menu, select **Activate**.
   Verify that the previous PAD process is deactivated.

Activate guided onboarding in Playbook content items

Activate guided onboarding in playbook content items and verify that the new content item launches the playbook record generator that is associated with it.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Playbook Experience** > **Playbook Content Items**.
2. Select **New Guided Onboarding Request**.
3. Select **Edit**.
4. Select the **Active** check box.
5. Select **Update**.

Add the Process tab to the portal

Add a **Process** tab to the CSM ticket page so that users can track the playbook process.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Open the configuration for your table.

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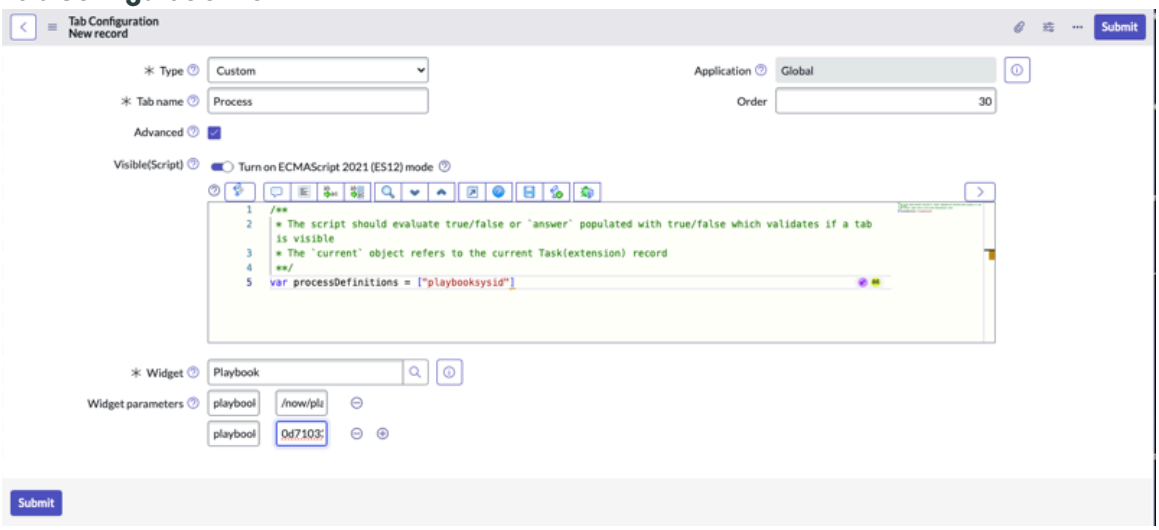
3. In the **Tabs** related list, click **New**.
4. In the **Tab Configuration** form, fill in the fields as follows.

Tab Configuration form



Tab configuration form fields

Field	Data
Type	Custom
Tab name	Process
Advanced	Toggle to active
Visible script	Add one or more playbook sysIds
Widget	Playbook
Widget parameters	Widget 1: Name: playbook_uib_page_url Value: /now/playbook-portal/csm_case_process Widget 2: Name: playbook_experience_id Value: 0d71033773f220109edbc1f52ff6a741

5. Select **Submit**.

Note:

For the user to view the process tabs in the portal, ensure you have assigned the requisite ACLs.

View cases in Draft state on the portal

Customers can view a list of cases in the Draft state from the Customer and Consumer Service Portals.

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When using playbooks on the Customer Service Portal or Consumer Service Portal, customers can view a list of cases in the Draft state by navigating to **Home** > **My Lists** > **My Draft Cases**. Selecting a case in the Draft state returns the user to the playbook intake stage and activities.

Enabling the Draft state

The Draft state for the base case is shipped as inactive by default. Customers can manually activate the Draft state in the Choice [sys_choice] table.

1. Navigate to sys_choice.list.
2. Select the following record:
   - **Table** = sn_customerservice_case
   - **Element** = state
   - **Label** = Draft
3. Select **Edit**.
4. Clear the **Inactive** check box.
5. Select **Update**.

For more information, see Choice list field type.

Case draft state values system property

The *sn_customerservice.case_draft_state_values* system property stores a comma-separated list of values for the Draft state choice list values for the cutomer service base case and case types. The default value for this property is 0.

Set up custom Playbooks for Portals

Create custom Playbooks for Portals to provide end users with the playbook experience on your service portal.

Overview of Playbooks

Playbooks guide users through complex processes and enable them to save their progress and resume their work when convenient. They can also get the information that they need for each stage of the flow and its associated activities with the Customer Service Management (CSM) playbooks on service portals.

You can activate Playbooks for Portals if you have the admin role. The base system is delivered in an inactive state. You must activate it in the Playbooks (PAD) for the user to see it.

Plugins required:

- Playbooks for Customer Service Management: sn_csm_playbook
- Playbook Experience: sn_playbook_exp
- Case Playbook for Onboarding: sn_onboarding (required if you need the predefined playbook experience)
- Case Playbook for Product Support: sn_product (required if you want to use the product case playbook and record generator)

Plugins are available from the ServiceNow® Store. For more information, see Playbook plugins.

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Summary of steps for setting up Playbooks for Portals

You can set up Playbooks for Portals using the following high level steps.

1. Define your process using Workflow Studio. See Create a playbook for more information.
2. Activate the record generator. For more information, see Activate the record generator.
3. Set up ACLs (Access Control Lists) to provide the appropriate read, write, and create permissions for users. See Explicit Roles in CSM for more information.

   Note: Add write and create roles with a condition based on "State=draft" so that users can only edit the fields in the draft state.

4. Create a Playbook Content Item so that users can navigate to the Playbook experience. See Create a Playbook Content Item for more information.
5. Set up a redirection widget so that users are redirected to the playbook intake experience once the state changes from "draft" to "new." See Set up a redirection widget for more information.

Create a Playbook Content Item

Create a content item of Playbook type on portal so that users can navigate to the playbook experience. These content items are specifically configured to enable the playbook experience on portals.

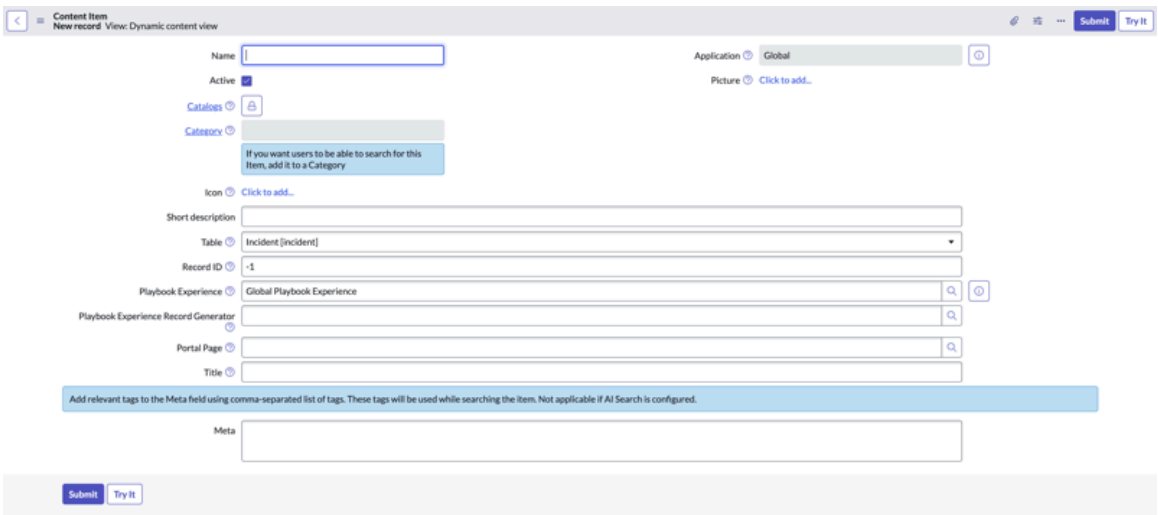
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Playbook Content Items** > **New**.

Content item form



2. In the form, fill out the fields.

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Relevant Content Item form fields

Field	Definition
Name	The name of the content item you are creating
Table	Map your table here
Record ID	Always enter -1
Playbook experience	The name of your playbook experience
Playbook experience record generator	Map your record generator
Portal page	`csm_intake` standard with the Playbooks for Customer Service Management application. **Note:** You can clone the `csm_intake` page and modify it per your requirements.
Title	Title that appears at the top of the page.

3. Select **Submit**.

What to do next

After completing this step, you can navigate to the portal where the catalog is mapped and execute the content item. The playbook intake experience opens, with the record generator mapped as the first activity.

Set up a redirection widget

You can set up a widget to reroute the user to the `csm_ticket` page once the record state changes from draft to new, indicating that the user has completed the intake process.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Open the widget **CSM Intake Redirect**.
3. Add the following code the in the client controller section.

Note: As a best practice, clone the **CSM Intake Redirect** widget to modify and replace it on the `csm_intake` page, or on your custom page.

```
spUtil.recordWatch($scope, 'sn_customerservice_case',
 c.data.filter, function(response) { //replace
 sn_customerservice_case with your table.

        if (response.data.operation ==
 "update" && response.data.record.state &&
 response.data.record.state.value != "0") { //checking if the
 state is not draft
```

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```
            if
 (($window.location.href).indexOf('?id=csm_ticket&') == -1);
            $window.location = "?id=csm_ticket&table=" +
 c.data.table + "&sys_id=" + c.data.sys_id;
        }
    });
```

4. Select **Update**.

Enable a reflow for your UI Builder pages

Enable a reflow for your UI Builder pages. This way, when you're resizing a window, you don't have to scroll horizontally.

Before you begin

Role required: admin

About this task

The reflow feature adjusts the properties of the components when you're resizing a window. It accommodates smaller screen sizes and changes the component's properties for the different screen sizes.

Procedure

1. Navigate to **All** > *UI Builder*.
2. Under **Experiences**, select **Playbook Experience Portal**.
3. Open a specific page or variant: Either **CSM Create Case Process** or **CSM Case Process**, for which you want to adjust the reflow.
4. Edit the **Playbook Activity Viewer** component settings.
5. On the **Styles** tab in the UI Builder, set the height of the activity viewer to 100vh.
6. Navigate to the component **Resizeable Panes** > **Panes configuration** and copy the code in the default displayed pane by editing the scripted property value.

```
// Resizable Panes default displayed pane scripted value
// when in left/right pane position
function evaluateProperty({api, helpers}) {
    if(!api.data.playbook_custom_layout.compactMode) return
 "both";
  return (api.data.playbook_custom_layout.selectedItem ||
 {}).stageContextId ? "right" : "left";
}
// when in top/bottom pane position
function evaluateProperty({api, helpers}) {
    if (!api.data.playbook_custom_layout.compactMode) return
 "both";

  return (api.data.playbook_custom_layout.selectedItem ||
 {}).stageContextId ? "bottom" : "top";
}
```

7. Select **Done**.
   For more details, see Reflow for playbook components.

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Configure dynamic related records

System administrators can configure the dynamic related records feature to display related records in the contextual side panel in CRM Workspace. These records dynamically change based on the context of the current record or playbook activity.

Configuring the dynamic related records feature involves several types of records. See the following table for details about these record types.

- Related record contexts
- Related record definitions
- Context related record definitions

Dynamic related record types

Record type	Description
Related record context	Defines the context in which related records appear in the Related Records tab. You can create a related record context for the following types of records: • A source record, such as a customer service case • A playbook activity, such as adding additional members to an onboarding case A context record identifies the following information: • The table that contains the type of record for which related records are being configured. • Additional conditions that apply to the selected table. These conditions determine if the related record definitions for the selected table are executed at runtime. • The types of related records to display, such as SLAs or emails.
Related record definition	Identifies one specific type of data to be retrieved, such as SLAs or active contracts. You can create a related record definition for each type of data to include in the Related Records tab and then associate one or more definitions with a context record.
Context related record definition	Defines the relationship between a context record and its associated definition records. When you open a context record, you can see the associated definition records in the Context Related Record Definitions related list.

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For more information about these tables, including field descriptions, see Dynamic related record tables.

How the context and definition records work

The context record defines the context in which related records appear in the Related Records tab. This includes conditions to apply to the selected record type. For example, to create a context record for an onboarding playbook activity:

1. Select the table that stores the activity: **Activity Execution [sys_pd_activity_context]**.
2. Define additional conditions that apply to the selected table:
   - **[Activity.Process definition] [is] [Onboarding playbook]**
   - **[Activity] [is] [Add additional members]**
   These conditions determine if the related record definitions for the selected table are executed at runtime. If the conditions evaluate to true, the definitions are executed. If false, the definitions are ignored. If a context has no conditions, this evaluates to true.
3. Select the related record definitions to execute: **Additional Members**

At runtime, the system checks to see if there are related record contexts that match the current record or playbook activity.

- When it finds a match, the system evaluates the conditions defined in the context.
- If the conditions evaluate to true, the system executes the related record definitions for the context.

To continue with the example above, an agent using the Case Playbook for Onboarding is currently working on the activity to add additional members. The system performs the following actions to display the correct related records:

- Checks the active contexts and finds **Onboarding Additional Members**.
- Evaluates the conditions in the context and determines that they evaluate to true.
- Executes the **Additional Members** related record definition.
- Retrieves and displays the correct set of records from the table identified in the **Additional Members** related record definition. In this case, the Related Party [sn_customerservice_related_party] table.

The definition record uses a script to define which related records are retrieved based on the context. This record also includes the table where the related record data is stored. At runtime, the script evaluates the context of the current record or playbook activity, along with any conditions, and dynamically displays the related record data.

Dynamic related record configuration tasks

Configuring the dynamic related records feature includes the following tasks:

- Configure the related record contexts and definitions to identify which related records to display in the Related Records tab.
- Configure the card layout for the records displayed in the Related Records tab.
- Configure the maximum number of related records to display.

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Related Records list card layout

Records appear in the Related Records tab in a card format. This format is created with Entity View Action Mapper (EVAM), a ServiceNow AI Platform application that standardizes how different data sources display in cards and lists.

EVAM uses view configurations and view templates to determine how information for each type of related record is displayed.

- EVAM view configuration: Combines conditions, the table and table fields, and declarative actions with an associated view template.
- EVAM view template: Contains the JSON used to give the necessary information for the card display and use.

EVAM view configurations can be grouped together to create configuration bundles. The Dynamic Related Records for Configurable Workspace plugin includes a configuration bundle, *`dynamic_related_records_bundle`*, which contains view configurations and view templates for the dynamic related records feature.

The system administrator can modify the view configurations in the *`dynamic_related_records_bundle`* or create new view configurations. This includes selecting the fields that are displayed on the card for each type of record. For more information, see:

- Define an EVAM view configuration
- Define an EVAM view template

Related record definitions included with the plugin

The Dynamic Related Records for Configurable Workspace plugin includes several related record definitions for case records. To view a list of definitions, navigate to **Dynamic Related Record** > **Related Record Definitions**.

The system administrator can make any of these definitions available to agents by adding them to the related records shared page in UI Builder.

Related Record Definitions table

Related record definition	Description
SLAs	Displays SLAs for a case, including information from the following fields: • Stage • SLA definition • Start time • Business time left
Emails	Displays emails for a case, including information from the following fields: • Notification type • Subject

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Related Record Definitions table (continued)

Related record definition	Description
	• Recipient • Date created
Escalations	Displays escalations for a case or for the account and contact or consumer, including information from the following fields: • State • Number • Escalation severity • Source record
Blocked By	Displays blocking tasks for a case, including information from the following fields: • Blocking task • Blocking reason
Child Cases	Displays child cases related to a case, including information from the following fields: • Number • Short description • Account and contact • Consumer

Dynamic related records

Display related records in the Contextual side panel in CRM Workspace that dynamically change based on the context of the current record or playbook activity.

The dynamic related records feature provides customer service agents with easy access to the information they need when they need it. Agents can view related records in the Contextual side panel without navigating away from the current tab and searching for information in other related lists. This feature also enables users to display related records without requiring any type of reference or parent-child relationship.

Different types of agents can use dynamic related records to see different information. For example:

- A front-line agent creating a new case can see similar, recently opened cases.
- A middle-office agent reviewing a complaint case can see active contracts for the customer.
- A back-office agent can view emails for a selected playbook activity.

To view related records, click the Related Records tab in the Contextual side panel in CRM Workspace. Records appear in the Related Records list as read-only cards.

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Configuring dynamic related records

System administrators can configure the dynamic related records feature and define the following information:

- Context records that specify the type of record for which related records are displayed, such as a case record or a playbook activity. A context can also specify any conditions for the record type that must be met in order for related records to be displayed.
- Definitions for each specific type of related record to display, such as SLAs or contracts.
- Relationships between context records and their associated definition records.

System administrators can also configure the related record card format. For more information, see Configuring dynamic related records.

Using dynamic related records

Agents can search the Related Records list by entering text in the search field or filter the list to display records of a specific type, such as SLAs or active customer contracts. Agents can expand a card to show more a more detailed view or open the list in a sub-tab. If agents have create permission, they can also create new related records of the selected type.

For more information about these agent actions, see Using the Related Records tab in the contextual side panel.

Dynamic related records plugin

The Dynamic Related Records for Configurable Workspace plugin (com.snc.uib.sn_dyn_rel_rec) is available from the ServiceNow Store.

Install any ServiceNow Store applications by requesting them 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.

This plugin provide agents with access to related information based on the context of the current record or playbook activity. System administrators can configure related record definitions that make data available in context to the action that the agent is performing.

This plugin adds the Dynamic Related Record menu and the following modules to the application navigator:

- Related Record Contexts
- Related Record Definitions

This plugin also adds several related record definitions. For more information, see Related record definitions included with the plugin.

Using dynamic related records with Playbooks for Customer Service Management

The Playbooks for Customer Service Management plugin (sn_csm_playbook) adds the dynamic related records feature to CRM Workspace. It also includes the Case context record and several related record definitions.

The Case Playbook for Onboarding, Case Playbook for Complaints, and Case Playbook for Product Support applications include additional context records and related record definitions.

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Related topics

Configure dynamic related records

Using the Related Records tab in the contextual side panel

Using the Related Records tab in the contextual side panel

Agents can view, search, and sort the records in the Related Records tab in the contextual side panel.

The Related Records tab displays related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the Related Records tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Related Records tab in the contextual side panel

Task	Steps
View related records in the contextual side panel	Select the Related Records tab to view the Related Records list. Related records appear in the list in a card format. The initial set of records displayed in the list is determined by the record type selected in the filter at the top of the list.
Select the type of related record to view	Use the filter at the top of the Related Records list to select the type of related records to view. Agents can also use the filter to see the current selection. **1.** Select the filter icon. **2.** Select a record type from the drop down menu. The drop down menu includes the related lists that have been configured for the parent record.
Search the related records list	Use the search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. **1.** Enter the search text in the search field at the top of the Related Records list. **2.** Select the search icon. **Note:** The search field is grayed out if search is not available for the selected type of related records.
Open a related record in a sub-tab	Select a card in the Related Records list to open the record in a sub-tab under the parent record. In the sub-

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Related Records tab in the contextual side panel (continued)

Task	Steps
	tab, the agent can view the record details and perform available actions.
Open the related record list in a list view in a sub-tab	Select the list view icon to display the related records in a list view in a sub-tab under the parent record.
Create a record for the selected related list	Create a record for the record type currently selected in the Related Records list. This action opens a new record form in a sub-tab under the parent record. **1.** Select the create record icon at the top of the Related Records list. **2.** Fill in the fields on the record form and select **Save**.

Related records shared page

The Related Records shared page enables you to view records that are related to the current record or playbook activity in the contextual side panel.

The ui_builder_admin role or administrator role can configure a record page in UI Builder and use the Related Records shared page to add a Related Records tab on the contextual side panel. The Related Records tab shows the list of related records in card format.

Use the Related Records shared page to display records from tables that have a configured relationship to the main record. This can include multiple types of related records such as SLAs, active contracts, and emails.

The Related Records shared page:

- is part of the Base Agent Workspace app shell.
- is a public page that is available in the page templates.
- is a generic page that can be embedded in the contextual side panel for any page.

For more information about the Related Records shared page, see the Related Records component information on the ServiceNow Developer Site.

Dynamic related record tables

The dynamic related records feature uses different tables to store context and definition information.

The following tables support the configuration of the dynamic related records feature. These tables extend the sys_metadata table.

Related Record Context table

Records in the Related Record Context [sn_related_record_context] table define the context in which related records appear in the Related Records tab. This includes the following information:

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- The selected table. You can create context records for source records (such as customer service cases) or playbook activities (such as adding additional members to an onboarding case).
- Additional conditions that apply to the selected table. These conditions determine when the related record definitions for the selected table are executed.
- The related record definitions to execute. These definitions identify the data to be retrieved, such as SLAs or emails.

Related Record Context table fields

Field	Description
Name	The unique name of the context record.
Applies to table	The table that stores the record type for the context record. To display related records for a source record, select the table that stores the source record. For example, Case [sn_customerservice_case]. To display related records for a playbook activity, select the table that stores the activities: Activity Execution [sys_pd_activity_context].
Primary reference field	The primary field from the **Applies to table** that is passed to the Context Related Record Definition for evaluation. The value is used by the scripted query in the definition. The following data types are supported: • Sys ID • Doc ID • Reference
Secondary reference field	The secondary field from the **Applies to table** that is passed to the Context Related Record Definition for evaluation. The value is used by the scripted query in the definition. The following data types are supported: • Sys ID • Doc ID • Reference
Application	The application to which the context record applies. This is a read-only field.
Active	Enables the context record.
Inherited	When enabled, the context record also considers tables that extend from the **Applies to table**.
Conditions	Conditions that are applied to the records in the **Applies to table**.

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Related Record Definition table

Records in the Related Record Definition [sn_related_record_definition] table identify one type of data to be retrieved, such as active contracts, case tasks, or SLAs. A definition record includes:

- The display label, which appears in the filter dropdown list in the Related Records tab.
- The table to be queried from. For example, the Email [sys_email] table.
- If needed, primary and secondary reference tables.
- Scripted conditions that further specify which fields to query from.

You can create definition records for each type of data to include in the Related Records tab and then associate the definitions with one or more context records.

Related Record Definition table fields

Field	Description
Display label	The unique name of the related record definition. This label appears in the filter list in the Related Records tab.
Primary reference table	The primary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Primary reference field** in the related record context, enter the table for that data type.
Secondary reference table	The secondary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Secondary reference field** in the related record context, enter the table for that data type.
Application	The application to which the definition record applies. This is a read-only field.
Queries from	The table that stores the related record data to be retrieved.
Active	Enables the definition record. A definition must be active for the related records of that type to be displayed in the Related Records tab.
Script	Create a script that defines which records are retrieved based on the context.

Context Related Record Definition table

The Context Related Record Definition [sn_m2m_context_related_record_defn] table defines the relationship between a context record and its associated definition records.

When you open a context record, you can see the associated definition records in the Context Related Record Definitions related list.

Context and associated definition records

Field	Description
Related record context	The context record.

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Context and associated definition records (continued)

Field	Description
Related record definition	The name of the related record definition associated with the context record. The system uses this definition to determine which records to retrieve.
Application	The application to which the context record applies. This is a read-only field.
Order	The order determines where the related record type appears in the filter list in the Related Records tab. The order for this related record definition is compared with the order of the other definitions associated with the **Related record context** to determine the order of appearance in the filter list. If more than one context applies to a record, the system evaluates the order for all of the related record types. If there is a duplicate related record type, the system takes the record type with the lowest order value.
Active	Enables the **Related record definition** for this context record.

Configure related record contexts

This type of configuration record defines the context in which related records appear in the Related Records tab.

Before you begin

Role required: admin

About this task

In a related record context, the system administrator configures the following information:

- The table that stores the record type for the context. You can create a context for a source record, such as a case, or for a playbook activity.
- Conditions to apply to the selected table. These conditions determine if the related record definitions associated with this context are executed at runtime.
  - If the conditions evaluate to true, the system executes the related record definitions.
  - If the conditions evaluate to false, the system ignores these definitions.

    Note: If a context has no conditions, this evaluates to true.

- The related record definitions to execute. Associate a definition for each type of related record to display for this context.

Procedure

1. Navigate to **All** > **Dynamic Related Record** > **Related Record Contexts**.
2. Click **New**.
3. Enter a **Name** for the context record.
4. Select the table that stores the record type for the context in the **Applies to table** field.

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5. In the **Primary reference field**, select the field from the **Applies to table** that is passed to the Context Related Record Definition for evaluation.
   The following data types are supported:
   - Sys ID
   - Doc ID
   - Reference
6. **Optional:** If desired, select another reference field from the **Applies to table** in the **Secondary reference field**.
7. Enable the **Inherited** field if you want the context record to also consider tables that extend from the **Applies to table**.
8. Use the condition builder to select conditions that are applied to the records in the **Applies to table**.
   For example, if you are creating a context for a playbook activity, you can use the condition builder to identify the playbook and then the specific activity within that playbook.
9. Click **Submit**.
   The context is added to the Related Record Contexts list.

Associate related record definitions with a related record context

Associate the desired related record definitions with a context record to determine which related records appear for the selected record type.

Before you begin

Role required: admin

About this task

A related record context includes the following information:

- The table that stores the record type for the context (source record or playbook activity).
- Conditions to apply to the selected table which determine if the associated related record definitions are executed at runtime.
- The related record definitions to execute.

Procedure

1. Navigate to **All** > **Dynamic Related Record** > **Related Record Contexts**.
2. Click the desired context.
3. In the Context Related Record Definitions related list, click **New**.
   You may need to change the application in order to see the **New** button:
   a. Click the system settings icon in the upper right corner.
   b. Click **Developer**.
   c. Select the **Application** and close the pop-up window.
4. Click the lookup icon in the **Related record definition list**.
5. Select a definition from the Related Record Definitions list.
6. Assign an order number to the definition in the **Order** field.
   The order determines where the related record type appears in the filter list in the Related Records tab.
7. Click **Submit**.

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Configure related record definitions

Related record definitions identify the types of records that the dynamic related records feature can display in the Related Records tab.

Before you begin

Role required: admin

About this task

The system administrator can create relate definitions and associate the desired definitions with a related record context. For example, the admin can associate SLA and escalation definitions with the Case related record context. Definitions can be associated with multiple contexts.

The Dynamic Related Records for Configurable Workspace plugin includes several related record definitions for case records. For more information, see Related record definitions included with the plugin.

Procedure

1. Navigate to **All** > **Dynamic Related Record** > **Related Record Definitions**.
2. Click **New**.
3. Enter a name for the definition in the **Display label** field.
   This label appears in the filter dropdown list in the Related Records tab. Agents click the filter icon and select the type of related record to view in the Related Records list.
4. In the **Queries from** field, select the table that stores the related record data to be retrieved.
5. Select a table in the **Primary reference table** field.
   The primary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Primary reference field** in the related record context, enter the table for that data type.
6. **Optional:** If desired, select a table in the **Secondary reference table** field.
   The secondary table used in the definition script. At runtime, the script expects to get passed a record of this type. If you entered a data type in the **Secondary reference field** in the related record context, enter the table for that data type.
7. Use the **Script** field to define which records are retrieved based on the context.

   At runtime, the script evaluates the current record's context, along with any selected conditions, and dynamically displays the related records.
8. Click **Submit**.

Configure the maximum number of related records to display

Configure the maximum number of related records to display in the Related Records tab in the contextual side panel in CRM Workspace.

Before you begin

Role required: ui_builder_admin, admin

About this task

As part of configuring the Related Records shared page, the administrator can define the maximum number of related records that are displayed in the Related Records tab in the contextual side panel. This is defined as part of the UI Builder data transform configuration. The default value is 100 records.

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Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the My experiences list, click the desired workspace.
3. In the Page menu, select **Record**.
   The Page menu is in the upper left corner of the UI Builder interface.
4. Click **Edit in original scope**.
5. In the Content list below the Page menu, click the **Contextual sidebar** component.
6. In the contextual sidebar configuration panel on the right side of the UI Builder interface, click the Config tab.
7. In the Tabs list, click **Related Record**.
8. Click **Edit Content**.
9. Click the Data icon in the bar on the left side of the UI Builder interface.
10. Under Local data resource instances, click **Look Up Related Records**.
11. In the Configuration tab for the data resource, enter a value in the **Max results** field.
12. Click **Save**.

Configure Customer Central

Provide customer service agents with all the information about a customer in one central place by configuring the Customer Information and Customer History views for Customer Central.

Before you begin

Role required: admin, or the app-specific sn_customer_central_admin role.

Note: Admins can assign either the full admin role for broad access or the app-specific sn_customer_central_admin role to limit access to only the Customer Central application (`sn_customercentral`).

About this task

Customer Central provides customer service agents with all the information about the customer in one central place. It enables them to quickly zoom in on the customer issue and provide efficient and empathetic service to their customers.

Customer Central consists of two views, Customer Information and Customer History. In CRM Workspace, Customer Central is displayed on the interaction, account, contact, or consumer records.

For more information, see Customer Central.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**.
3. In the Customer Central - Customer Information or Customer Central - Customer History category, view the list of tasks to configure the feature.

Customer central configuration tasks

Task	Description
Activate Customer Central	The Customer Central application (com.sn_csm_customer_central) is activated

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Task	Description
	with the CRM Workspace application (com.snc.uib.csm_agent_workspace). The CRM Workspace application is activated with the Case Management Core plugin (com.sn_customerservice). **Note:** Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) has moved to the ServiceNow Store.
Configure the Customer Information view using CRM Workspace	Configure the display of the Customer Information view using CRM Workspace.
Configure the Customer History view	Configure the display of the customer history view.
Configure the Customer History component	Starting with the Yokohama release, the Customer History component displays customer activity information on some record pages in CRM Workspace.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Activate Customer Central

Activate the Customer Central plugin to use Customer Central.

About this task

Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) is activated with the CRM Workspace application (com.snc.uib.csm_agent_workspace). The CRM Workspace application is activated with the Case Management Core plugin (com.sn_customerservice).

Starting with the Yokohama release, the Customer Central application (com.sn_csm_customer_central) has moved to the ServiceNow Store.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_csm_customer_central.
3. Select **Activate**.

   Note: To use Customer Central demo data, activate the Customer Service Management Demo Data (com.snc.customerservice.demo) plugin.

Create data for Customer Central

When upgrading from an existing release, customers must run a fix script to create data for Customer Central.

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Before you begin
Role required: admin

About this task
This task applies to customers who are upgrading their release version and installing Customer Central for the first time. Running the fix script creates data in the Activities table for Customer Central.

Procedure
1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Select the **Create activities for last N days data** fix script.
3. Select **Run Fix Script**.

Configure Customer Central properties

Set how many days you want to display data from in Customer Central.

Before you begin
Role required: admin

About this task
This property applies to both the Customer Information and Customer History views.

Procedure
1. Navigate to **All** > **Customer Central** > **Administration** > **Properties**.
2. Enter the number of days you want to display data from in Customer Central.
   The default is set to 30.

Configure the Customer Information view using CSM Agent Workspace

Configure the display of the Customer Information view using the CSM Agent Workspace.

Before you begin
Role required: csm_guided_setup_user or admin

About this task
The Customer Information view displays all touch points that a customer has had with a contact center in the form of information cards.

Note: The following steps can be used to configure the Customer Information view in the CSM Agent Workspace. This is the workspace that is configured using the ServiceNow AI Platform interface.

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Customer Central - Customer Information category, view the list of tasks to configure the feature.

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Customer Central - Customer Information configuration tasks

Task	Description
Configure your settings for the Customer Information view	Set the Customer Central properties as required.
Configure customer information lists	Configure the lists to display on the Customer Information view. For example, a list can be recent cases or recent chat interactions.
Configure customer information reports	Configure which reports to display on the Customer Information view.
Configure customer information records	Configure the records to display on the Customer Information view. For example, a record could provide information on the contact or consumer.
Configure customer information report groups	Configure the groups of reports to display in a single section on the Customer Information view.
Configure customer information contexts	Associate each list, record, report, and report group configuration you created with a consumer or contact context, depending on who you want to display the information for.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Configure lists for the Customer Information view

Configure lists for the Customer Information view.

Before you begin

Role required: admin

About this task

Lists are displayed in the Customer Information view in CRM Workspace.

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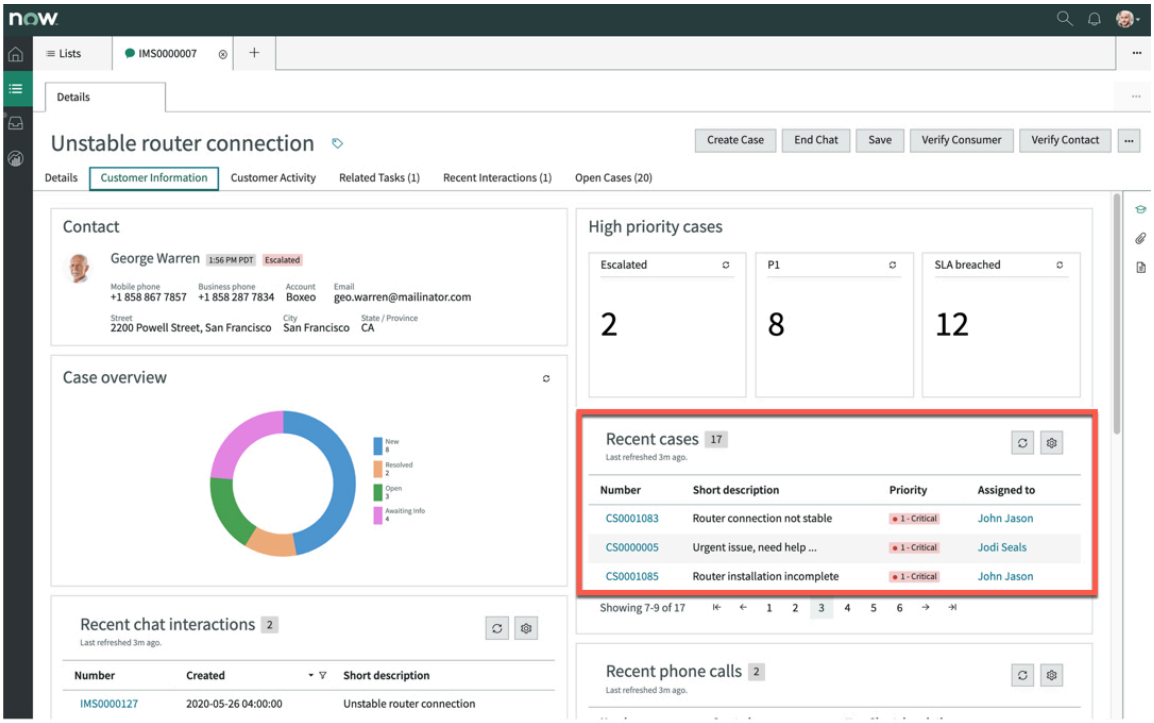

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **List Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

New lists configurations field description

Field	Description
Title	Enter a title for the list configuration.
Context table	Select a context table.

Relationship	Enter the relationship between the context and the list.
	a. To create a new relationship, click the Lookup icon and then New.
	b. Enter a name for the relationship.
	c. In the Applies to table, select either the contact or consumer context table.
	d. In the Queries from table select the table from which this list retrieves data.
	e. In **Query with**, type a script to specify the records to include from the table for the relationship queries. For example:
	`current.addQuery("contact", parent.sys_id);`
	`“contact” => is the name of the column in the list`

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Field	Description
	table that stores the context ID, for example, contact ID. “parent.sys_id” => is the unique key in the contact table that holds the contact record. Note: If building a new relationship, ensure that the exact column name from the list table that stores the context ID is specified here.
View	Select the name of the view that has the set of columns to display for this list. For information on how to create a view, see Configure the list layout.
List limit	Enter the number of records to display in the list. You can access the remaining records using pagination.

4. Select **Submit**.

Configure reports for the Customer Information view

Configure which reports to display on the Customer Information view.

Before you begin

Role required: admin

About this task

Reports are displayed in the Customer Information view in CRM Workspace.

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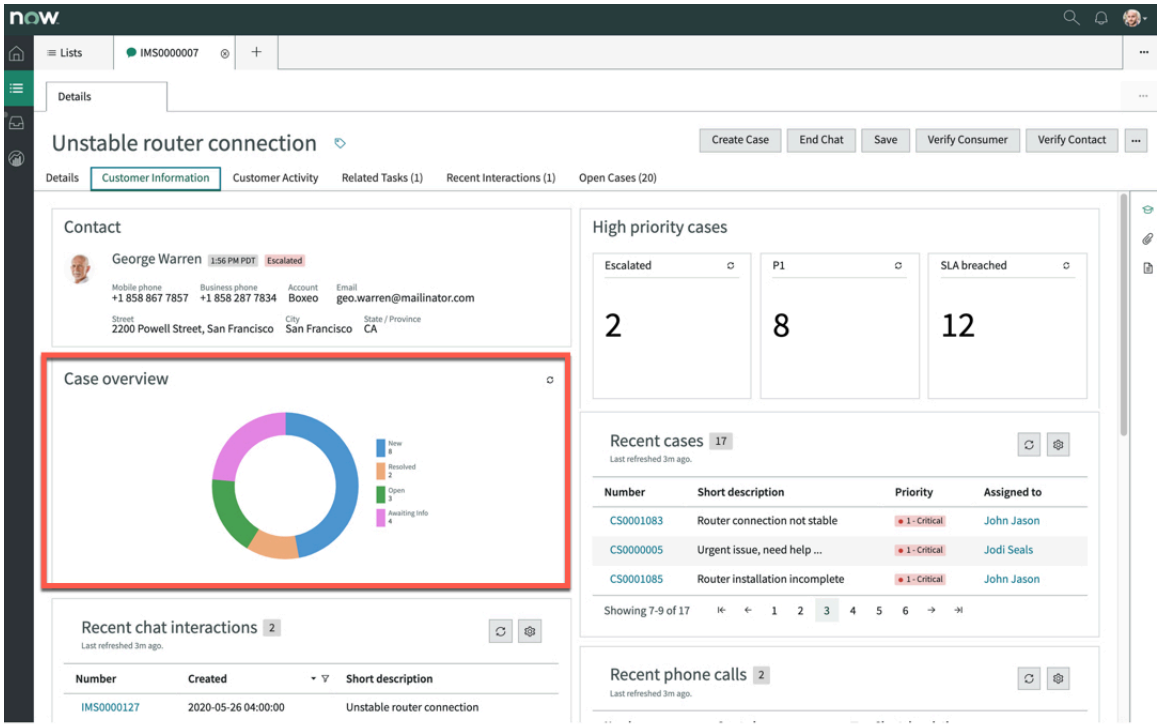

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Report Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

Field	Description
Title	Enter a title for the report.
Context table	Select a Context table. **Note:** For example, enter Contact if you want to display all the information about a customer contact.
Report	Select a report. **Note:** Only pie charts, doughnuts, and single score charts are supported.
Relationship	Enter the relationship between the context and the report. **a.** To create a new relationship, click the Lookup icon and then New. **b.** Enter a name for the relationship. **c.** In the Applies to table, select either the contact or consumer context table. **d.** In the Queries from table select the table from which this list retrieves data.

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Field	Description

	e. In **Query with**, enter a script to build the relationship between the context table and the report table. You can also specify any filter conditions if needed. For example:
	`current.addQuery("contact", parent.sys_id);`
	
	`“contact” => is the name of the column in the report table that stores the context ID, for example, contact ID.`
	`“parent.sys_id” => is the unique key in the contact table that holds the contact record.`
	`Note: If building a new relationship, ensure that the exact column name from the report table that stores the context ID is specified here.`

4. Select **Submit**.

Configure records for the Customer Information view

Configure the records to display on the Customer Information view. For example, a record could provide information on the contact or consumer.

Before you begin

Role required: admin

About this task

Records are displayed in the Customer Information view in CRM Workspace.

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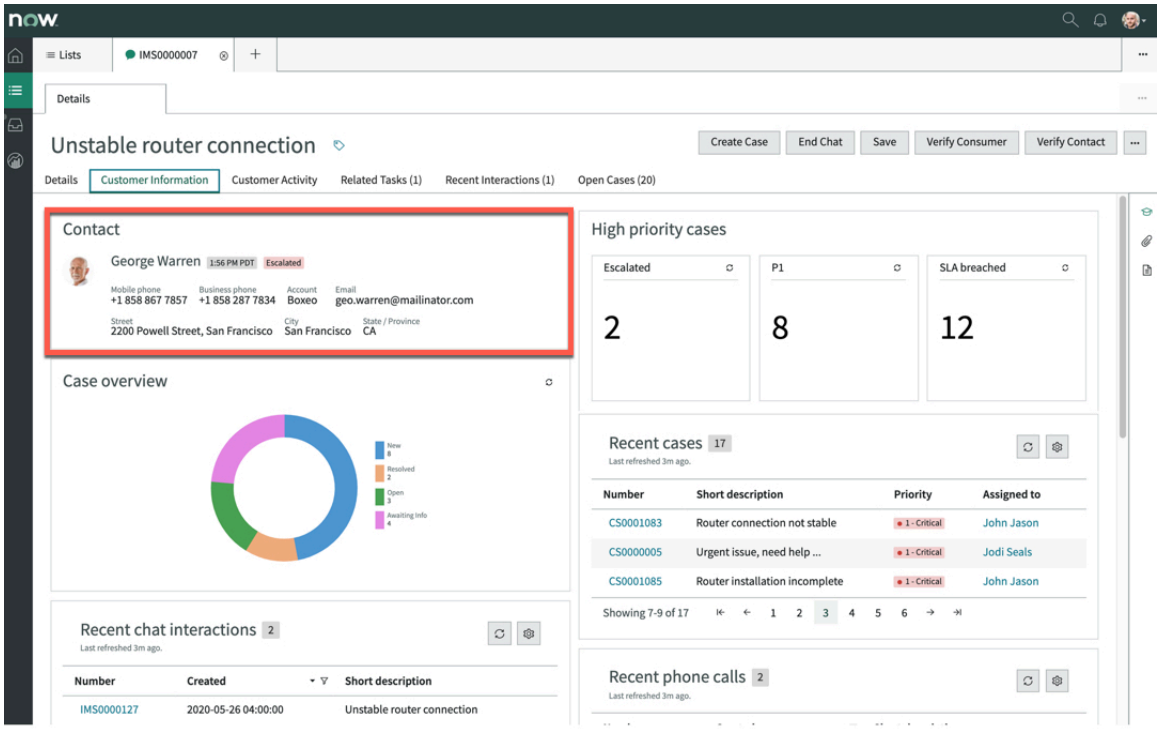

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Record Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

New record configurations field description

Field	Description
Title	Enter a title for the record.
Context table	Select a Context table. **Note:** For example, enter Contact if you want to display all the information about a customer contact.
Relationship	Enter the relationship between the context and the record. **a.** To create a new relationship, click the Lookup icon and then New. **b.** Enter a name for the relationship. **c.** In the Applies to table, select the table on which the list appears. **Note:** Enter either contact or consumer. **d.** In the Queries from table select the table from which this list retrieves data.

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Field	Description

	e. In **Query with**, enter a script to build the relationship between the context table and the record table. You can also specify any filter conditions if needed. For example:
	`current.addQuery('sys_id', parent.sys_id);`
	
	`“sys_id” => is the name of the column in the record table that stores the context ID, for example, contact ID.`
	`“parent.sys_id” => is the unique key in the contact table that holds the contact record.`
	`Note: If building a new relationship, ensure that the exact column name from the record table that stores the context ID is specified here.`

Fields	Select the fields to display on the record. **Note:** For the out-of-the-box **Contact** and **Consumer** record configurations, the **Fields** value is locked and displays the default fields for the corresponding context table. To display additional or different fields on the Contact Card in the Customer Information view, see Configure fields on the Contact Card in the Customer Information view.

4. Select **Submit**.

Related topics

Configure fields on the Contact Card in the Customer Information view

Configure report groups for the Customer Information view

Configure the groups of reports to display in a single section on the Customer Information view.

Before you begin

Role required: admin

About this task

Report groups are displayed in the Customer Information view in CRM Workspace.

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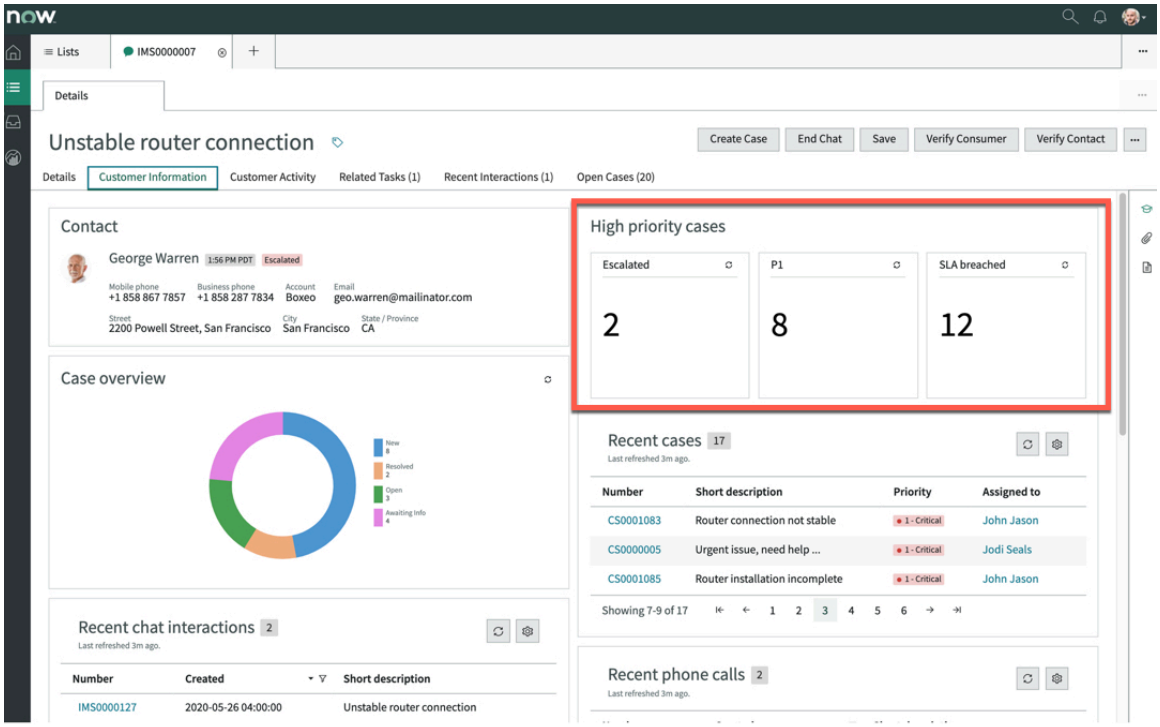

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Report Group Configurations**.
2. Select **New**.
3. Fill out the fields, as required.

Report Group configurations form fields and descriptions

Field	Description
Title	Enter a title for the report group.
Context table	Select a Context table. **Note:** For example, enter Contact if you want all the information about a customer contact to be displayed.
Report configurations	Select the list of reports to be displayed in the group.

4. Select **Submit**.

Configure customer information contexts for the Customer Information view

Associate each list, record, report, and report group configuration you created with a consumer or contact context, depending on who you want to display the information for.

Before you begin

Role required: admin

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About this task

Configure customer information cards to display each of the list, record, or report configurations for a consumer or contact. Each customer information card corresponds to a card on the Customer Information view.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer Information** > **Customer Information Contexts**.
2. Select the contact or consumer record that you want to add your configuration to.
3. On the Customer Information Cards related list, select **New**.
4. Add your configuration to create a customer information card.
5. Select **Submit**.

Note: Repeat these steps for every configuration that you want to add to the contact or consumer record. You can also change the layout and order in which to display the cards on the Customer Information view.

Configure the Customer Information view using CRM Workspace

Configure the display of the Customer Information view using CRM Workspace.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

The Customer Information view displays all touch points that a customer has had with a contact center in the form of information cards.

Note: The following steps can be used to configure the Customer Information view in CRM Workspace. This workspace is configured using UI Builder.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Customer Central - Customer Information for CRM Workspace category, view the list of tasks to configure the feature.

Customer Central - Customer Information for CRM Workspace configuration tasks

Task	Description
Configure your settings for the Customer Information view	Set the Customer Central properties as required.
Configure customer information lists	Configure the lists to display on the Customer Information view. For example, a list can be recent cases or recent chat interactions.
Configure customer information reports	Configure which reports to display on the Customer Information view.
Configure customer contact cards	Configure the contact card to display contact information on the Customer Information view. For example, a contact card could

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Task	Description
	provide information on the contact,consumer, or account.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Configure the Customer History view

Configure the display of the Customer History view.

Before you begin

Role required: admin

About this task

The Customer History view provides customer service agents an overview of all interaction that a customer has had with a contact center in the form of an activity feed.

There are two panels on the Customer History view. On the left, the facets categorize the customer touch points and a customer service agent can filter to display the data they want. On the right, the activity feed displays more detailed information on each of the facets in reverse chronological order.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer History** > **Guided Setup**.
2. On the Customer History Configuration page of the guided setup, view the list of tasks listed in the following order.

   Select **Get Started** beside each block to configure the features.

   a. Customer History Properties
   b. Activity Feed
   c. Activity Contexts

Customer History configuration tasks

Task	Description
Configure Customer Central properties	Set the Customer History view component attributes as required.
Configure activity types	Create an activity type to display in the activity feed on the Customer History view.
Configure activity groups	Create an activity group and then add activity types to the activity group.
Configure activity type templates	Create an activity type template to define how to display the activity type data on each of the activity tiles in the activity feed.
Configure activity contexts	Add the activity groups and activity types you created to an activity context, depending on who you want to display the information for and create facets to group the data.

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3. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Configure component attributes for the Customer History view

Set the Customer History view component attributes, as required.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Central** > **Administration** > **Related Items**.
2. Select **Customer History**.
3. Select **Advanced View**.
4. Select the Component Attributes tab.
5. Set the following component attributes, as required.

Related items, advanced view property field description

Property	Description
childFacetsListSize	Number of child facets to display. Default value is 3.
activitiesListSize	Number of activities to display in the activity feed. Default value is 10.

Note: Avoid making changes to the other component attributes in this list.

Configure activity types for the Customer History view

Create an activity type to display in the activity feed on the Customer History view.

Before you begin

Role required: admin

About this task

An activity type is an action that a contact or consumer performs. These actions are displayed in the activity feed on the Customer History view.
Activity types are displayed in the Customer History view in CRM Workspace.

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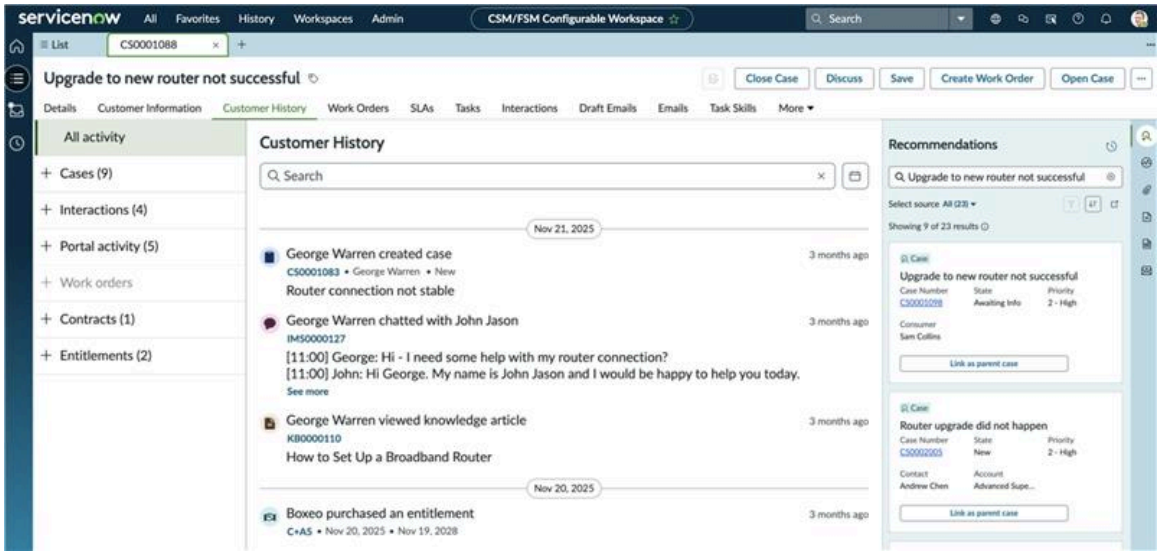

Procedure

1. Navigate to **All** > **Customer Central** > **Customer History** > **Guided Setup**.
2. Select **Get Started** under Activity Feed.
3. Select **Configure** beside Activity Types.
4. Select **New**.
5. Fill out the fields, as required.

New Activity Types field description

Field	Description
Short description	Enter a name for the activity.
Activity message	Enter the message that is displayed on the activity tile in the activity feed. **Note:** If the message is not yet defined, you can create a message. Refer to the video above on how to create a message.
Activity source	Enter the table on which the activity is performed. For example, if creating a case is the activity, the Case table is the Activity Source.
Actor	Enter the person performing the activity.
Object	Select an Object, which is the unique key that identifies the object on which the activity is performed.
Filter conditions	Specify any condition that must be met for the activity to be displayed in the activity feed.

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Field	Description
Active	Deselect the **Active** check box to not display the activities corresponding to this type in the activity feed. **Note:** If you deselect this check box, deselect the corresponding facet. If not, the facet displays with no data.
Verb	Select a verb that describes the activity performed. **Note:** If the verb is not yet defined, you can create a verb. Refer to the video above on how to create a verb.
Target	Select the second person involved in the activity. Not all activities have a second person.

6. Select **Submit**.

   Note: Once you create a new activity type, a new business rule is created.

7. After submitting, you can configure the business rule in one of two ways:
   - Select the link to the business rule in the notification message.
   - Go to the Activity Feed page and select **Configure** beside the Business Rule section.

   Note: Configuring the business rule is optional. The business rule is required to create a record in a central activity table each time the action is performed. The central activity table improves the performance of rendering the feed during runtime. Create a business rule for each activity type.

8. In the Advanced tab, update the script.
   The following is an example script.

```
var actSubCtx =
 global.ActivitySubscriptionContext.getContext();
if (current.contact) {
    actSubCtx.getActivityService().createActivity(current,
 verb, "", "", "", module);
}
current: current variable in business rules holds the
 GlideRecord of the table on which the business rules is
 triggered. If this business rule is on Case table, current
 will hold the GlideRecord of the case.
verb: verb that is configured in the Verb field of the created
 activity type
module: module that is configured in the Module field of the
 created activity type
Note: If there is already a Create Activity business rule, a
 notification message will also be displayed. You can update
 the script as required.
```

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Configure activity groups for the Customer History view

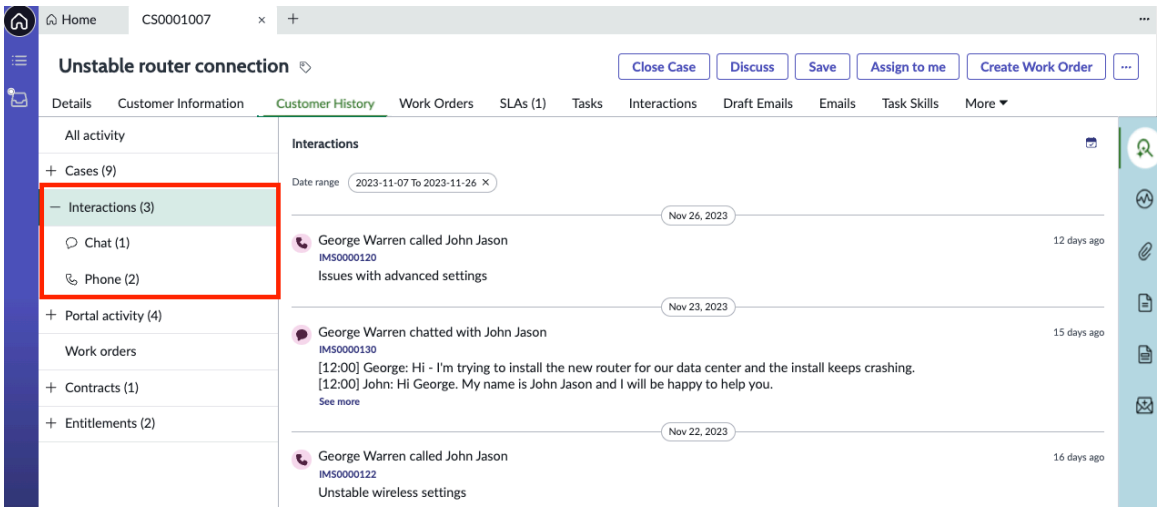
Create an activity group and then add activity types to the activity group.

Before you begin

Role required: admin

About this task

An activity group is a logical grouping of activity types. An activity group is displayed in the activity feed based on the facet selected.
Activity groups are displayed in the Customer History view in CRM Workspace.



Learn more about configuring activity groups from the following video tutorial.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer History** > **Guided Setup**.
2. Select **Get Started** under Activity Feed.
3. Select **Configure** beside Activity Groups.
4. Select **New**.
5. Fill out the fields, as required.

New Activity Groups field description

Field	Description
Name	Select a name for the activity group.
Table name	Select the table that stores the object on which the activities in this group are performed. Usually, it is the same as the Activity Source selected in the Activity Type.

6. Once you have created an activity group, select it from the Activity Group list and add the activity types to the group.
7. On the Activity Types related list, select **New**.
8. Fill out the fields, as required.

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New Activity Types field description

Field	Description
Activity type	Select the activity type you want to add to the activity group.
Activity group field	Select the field from the Activity Source table that identifies the object in the table associated to the Activity Group.

9. Select **Submit**.

Configure activity type templates for the Customer History view

Create an activity type template to define how to display the activity type data on each of the activity tiles in the activity feed.

Learn more about configuring activity type templates from the following video tutorial.

Before you begin

Role required: admin

About this task

You can define which fields are displayed, where it is displayed on the tile, and the order of the display.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer History** > **Guided Setup**.
2. Select **Get Started** under Activity Feed.
3. Select **Configure** beside Activity Type Templates.
4. Select **New**.
5. Fill out the fields, as required.

Activity Type templates field description

Field	Description
Name	Enter a name for the template.
Activity Type	Select the activity type to add the template for.
Icon	Select an icon to use for the activity type.
Icon Background	Select a background color from the drop-down, then select the green check mark to apply. If no default colors are set by the admin in UI Builder, gray is applied automatically.

6. Select **Submit**.
7. Once you have created an activity type template, select it from the Activity Type Template list to configure the fields and order of fields to display.
8. Select New to create template fields for the activity type.

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9. Fill out the fields, as required.

New Activity Type template field description

Field	Description
Type	Select a Type to determine whether you want to select fields from the activity source or activity group table.
Field	Select the field you want to add. **Note:** You cannot configure HTML fields for display in the subheader on the activity tile.
Show label	Select this check box to show the field label on the activity tile.
Position	Select the Position to determine whether the field should appear as content or as a sub-header on the activity tile. **Note:** Only one field is displayed as content on the activity tile.
Order	Select the order the field should appear on the activity tile.
Enable link to activity group record	Select this check box to display the field as a link to the activity group record.
Display as time ago	Select this check box to display the field in time ago format. **Note:** This field only applies to fields including time or date information.
Content icon	Icon for the content displayed on a tile. **Note:** This field is only displayed when Content is selected in the Position field.
Content tooltip	Tooltip for the icon displayed on a tile. **Note:** This field is only displayed when Content is selected in the Position field.
Condition	Condition that applies to the selected field. For example, in the transcript activity type template, you can configure a condition to

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Field	Description
	show transcript when the Chat Summary field is empty.

10. Select **Submit**.

Associate activity groups and activity types to activity contexts

Add the activity groups and activity types that you created to an activity context, depending on who you want to display the information for.

Learn more about associating an activity group to an activity context from the following video tutorial.

Learn more about associating an activity type to an activity context from the following video tutorial.

Before you begin

Role required: admin

About this task

An activity context is the person or user who is interacting with the customer service agent. There are two predefined activity contexts: consumer and contact. Add the activity groups and activity types that you created to the activity context, depending on who you want to display the information for.

Procedure

1. Navigate to **All** > **Customer Central** > **Customer History** > **Guided Setup**.
2. Select **Get Started** under Activity Contexts.
3. Select **Configure** beside Activity Context Groups.
4. Open the contact or consumer record that you want to add your configuration to.
5. On the Activity Context Groups related list, select **New**.
6. Add the activity group.
7. On the Activity Context Types related list, select **New**.
8. Fill out the fields, as required.

Activity context types related list field description

Field	Description
Activity type	Add the activity type.
Fetch from activities	Deselect Fetch from Activities if a business rule isn't defined for this activity type.
Filter conditions	Add filter criteria to apply filter conditions on the source table.
Source mapping field	Select the field in the Source table that is related to the context.
Context mapping field	Select the field in the Context table to map to the field selected in **Source mapping** field.

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Field	Description
Advanced mapping	Select Advanced Mapping and write a script in the **Advanced mapping script** field if the source and context mapping isn't sufficient.

9. Select **Submit**.

Create facets for activity contexts

Create facets to group the data and enable customer service agents to filter and display the data they want to see in the activity feed.

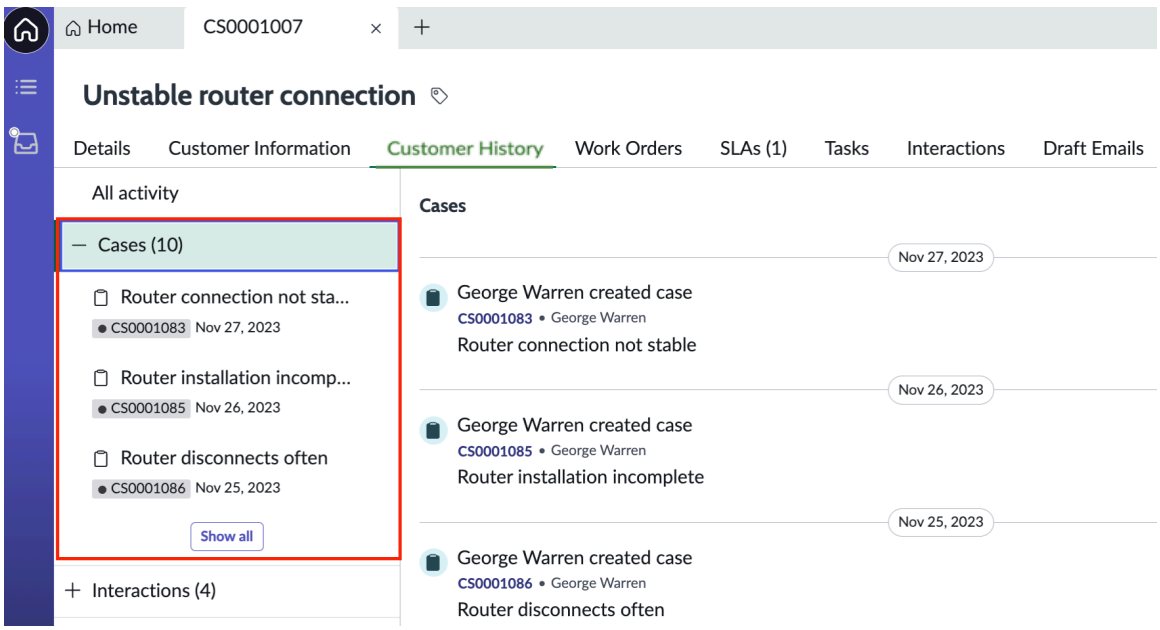
Learn more about configuring facets from the following video tutorial.

Before you begin

- Role required: admin
- Ensure that the application scope is set to Customer Central.

About this task

An activity context is the person or user who is interacting with the customer service agent. There are two predefined activity contexts: consumer and contact. Facets group the data, which enables customer service agents to filter and display the data they want to see in the activity feed. Each facet represents an activity group.
Facets are displayed in the Customer History view in CRM Workspace. Dynamic facets display record details associated with the facet.



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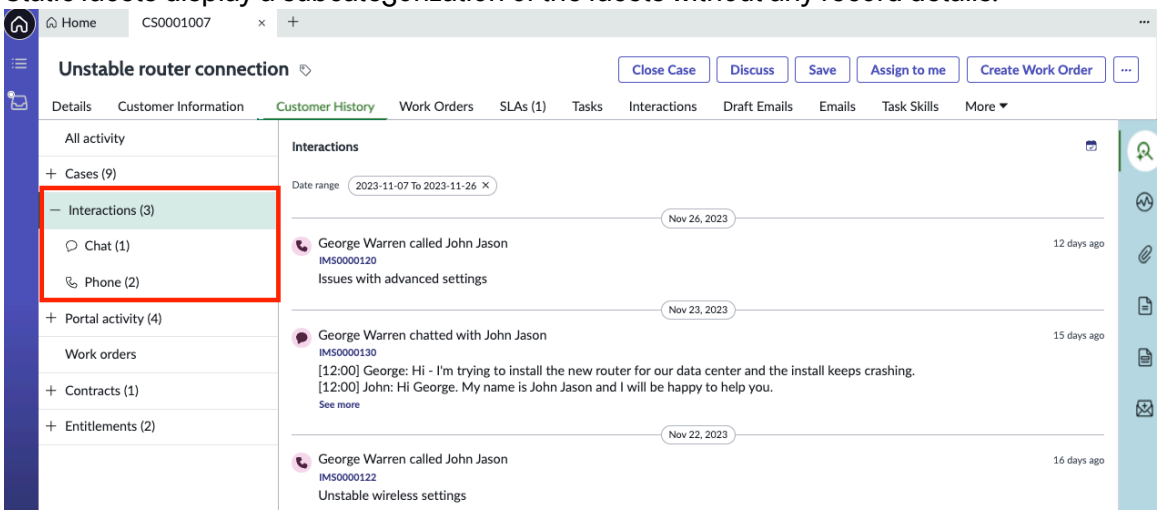
Static facets display a subcategorization of the facets without any record details.



Procedure

1. Navigate to **All** > **Customer Central** > **Customer History** > **Guided Setup**.
2. Select **Get Started** under Activity Contexts.

   Note: The Get Started button becomes active only after you complete all configurations and select Mark as Complete in the previous sections.

3. Select **Configure** beside Facets.
4. Open the contact or consumer record that you want to create facets for.
5. On the Facets related list, select **New**.

   Note: Ensure that the application scope is set to Customer Central. The New button only appears under this scope.

6. Fill out the fields, as required.

New activity contexts field description

Field	Description
Name	Enter a Name for the facet. This is the name of the facet that appears on the Customer History view.
Activity context group	Add an activity context group for the facet.
Facet type	Select whether the facet is dynamic or static. Dynamic displays record details associated with the facet. Static displays a subcategorization of the facets without any record details. Static facets can also be associated to a facet group.
Order	Enter the order the facet should appear in.

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Field	Description
Facet group	If you selected facet type Static, associate the facet to a group. If you associate the facet to a facet group, this facet becomes a subcategory of the facet group you selected.
Icon	Select an icon for the facet.
Facet title	If you selected facet type Dynamic, choose the field of the record to display as the facet title.
Facet fields	If you selected facet type Dynamic, select the fields to display for each record.

7. Select **Submit**.

Configure the Customer Service mobile application

Configure the Customer Service mobile application and customize it for agents who use the application instance on their mobile devices.

Before you begin

Role required: admin

About this task

The Customer Service Mobile plugin (com.sn_csm_mobile) enables the Customer Service mobile application.

Procedure

1. Navigate to **All** > **System Applications** > > **ServiceNow Studio**.
2. In the **Select Application** pop-up window, select **Customer Service Mobile**.
   The Customer Service mobile application opens in the Studio, which is a guided app creator. For more information about using the Studio, ServiceNow Studio.
3. Customize the application to display the desired applets and data and configure agent actions and notifications.

Configure omnichannel

Set up multiple communication channels so that customers can contact you through their preferred methods.

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Consumer messaging apps

Integrate Customer Service Management with consumer messaging apps to deliver a conversational mobile messaging experience for consumers and customer contacts.

Chat

Configure Chat to enable and use Virtual Agent to create or use predefined chatbot topics (conversations) for your users, and give them the option to switch to a live agent at any time.

Email

Configure an email channel to either create interactions or cases from incoming emails.

Phone

Configure Computer Telephony Integration (CTI)- based phone support for customers using OpenFrame and ServiceNow native voice controls via Interaction Controls Component (ICC). Integrate with a third-party telephony system via CCaaS integration, and use the call capability within your Workspace.

Communication channels overview

Configure communication channels for users to email, call, or chat, and integrate social media channels. This ensures users can reach your team through their preferred method for assistance.

Consumer messaging apps

Integrate Customer Service Management with consumer messaging apps to deliver a conversational mobile messaging experience for consumers and customer contacts. Customers can message your company using their preferred app to start a conversation with a virtual or live agent. The following consumer messaging apps can be integrated with Customer Service Management: WhatsApp, LINE, Facebook Messenger, and Apple Messages for Business.

Chat channel

The chat communication channel uses the Connect Support feature to provide chat capability from the Customer Service and Consumer Service Portals. You can also enable Virtual Agent to create or use predefined chatbot topics (conversations) for your users.

Email channel

Customers can send emails to create cases and update current cases, and receive email updates from agents as cases progress. Customer Service Management uses the ServiceNow email accounts feature to create and maintain email accounts.

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Phone channel

Computer Telephony Integration (CTI) helps integrate a third-party telephony system to your ServiceNow Workspace via OpenFrame and Interaction Controls Component (ICC). Any third-party Contact Center as a Service (CCaaS) platform (like Amazon Connect or Genesys) can integrate to the ServiceNow CRM Platform. CCaaS can integrate their voice call controls and workflows into their provisioned instance to enable agents to handle phone calls directly within their Workspace.

Omnichannel Callback

Set up and configure Omnichannel Callback for Customer Service Management to enable customers to request voice or video callbacks. Customize the feature to meet your organization's needs, enhancing customer experience and optimizing case resolution efficiency.

Consumer messaging apps

Omnichannel for Customer Service Management (CSM) provides a unified way to handle customer interactions across multiple channels from a single workspace, with centralized routing through Advanced Work Assignment (AWA). Consumer messaging apps are a supported channel type, allowing customers to contact support through familiar messaging platforms while agents work in the same environment.

For integration details, see Integrating with consumer messaging apps.

Supported messaging platforms

Omnichannel for ServiceNow supports the following consumer messaging platforms:

WhatsApp

Your organization's WhatsApp Business number receives messages from customers. Conversations persist across sessions, allowing customers to return to the same thread without repeating information. Agents can send outbound messages from contact records and share rich media including images, documents, and location.

ServiceNow Otto in Virtual Agent can automatically resolve common customer questions before an interaction reaches an agent. For more information see, Configure ServiceNow Otto for Customer Service Management (CSM) in Virtual Agent.

For integration details, see Integrating WhatsApp with Customer Service Management using the WhatsApp Cloud API and Integrating WhatsApp with Customer Service Management through Twilio.

Facebook Messenger

Customers start conversations from the Messenger app or from your organization's Facebook page. Each conversation creates an interaction record that links to contact information and case history.

For integration details, see Integrating Facebook Messenger with Customer Service Management and Conversational Integration with Facebook Messenger.

LINE

Your organization's LINE Official Account receives messages after customers add it. Conversations support text, images, and stickers.

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For integration details, see Integrating LINE with Customer Service Management and Conversational Integration with LINE.

Apple Messages for Business

Customers tap the Messages icon on your website, in Maps, in Safari, or in Search to start a conversation in the native Messages app. Organizations must register with Apple Business Register and use an approved Messaging Service Provider (MSP).

Agents can send rich messages including list pickers, time pickers, and quick reply buttons to guide customers through common workflows. Conversations support images, documents, and Apple Pay transactions.

For integration details, see Integrating Apple Messages for Business with Customer Service Management and Conversational Integration with Apple Messages for Business.

Benefits of consumer messaging apps

Benefits by role

Role	Benefit
Customers	Customers reach support through the messaging apps they already use, without downloading additional software or creating new accounts. Messaging conversations are asynchronous, allowing customers to send messages and return later without staying connected. Conversation history persists across sessions, so customers don't repeat information when they return.
Agents	Agents handle messaging interactions in the same workspace used for chat, email, and voice. Each messaging conversation displays customer context including account details, case history, and previous interactions. Agents can transfer conversations to other agents, escalate to cases, and send outbound messages to customers from contact records.
Administrators	Messaging platforms are configured independently and can be activated incrementally. AWA applies the same routing logic across all messaging platforms, so you can manage agent workloads and service level agreements from one system. All messaging interactions are tracked as interaction records, providing consistent visibility into volume, resolution, and agent activity.

Integration approaches

Consumer messaging apps can be integrated with CSM using two approaches:

Conversational integration

Conversational integration routes messaging conversations through Virtual Agent before escalating to live agents. Customers interact with virtual agent topics that try to resolve the issue on their own. When the virtual agent can't resolve the issue, the conversation escalates to a live agent with full context. This approach is available for WhatsApp, Facebook Messenger, LINE, and Apple Messages for Business.

Direct integration

Direct integration routes messaging conversations directly to live agents without virtual agent deflection. Customers send messages that create interaction records

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and are routed to agents based on AWA rules. This approach is available for WhatsApp and provides the fastest path to live agent support.

Configure WhatsApp channel

Configure WhatsApp as a consumer messaging channel within ServiceNow Customer Service Management using the WhatsApp Cloud API. WhatsApp integrates with ServiceNow Otto - Virtual Agent, to answer customer questions, with conversations routing to agents through the CRM Workspace. Twilio integration is also supported but offers more limited functionality than the Cloud API.

Here's an example of a customer service journey combining WhatsApp support with omnichannel.

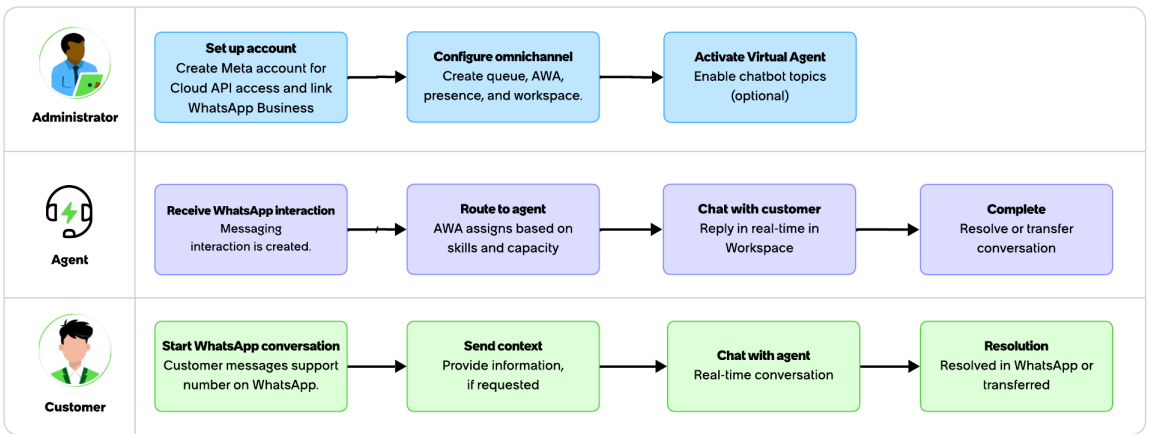
Amara is a customer support director at a global e-commerce company managing support across multiple channels. Customers increasingly prefer WhatsApp for support, but the team was handling WhatsApp conversations outside of ServiceNow through a separate platform, creating data silos and inconsistent service levels.

After setting up WhatsApp channel integration through the WhatsApp Cloud API (or Twilio), the team can now receive WhatsApp conversations directly in the CRM Workspace. They get the same queue management, assignment routing, and interaction tracking as other channels.

After setting this up, the customer saw support friction drop for WhatsApp-first users, and three channels became one unified workspace. First-response time improved by 35%, and agents now see all customer interactions (WhatsApp, chat, email, phone) in a single queue.

The following diagram shows the WhatsApp configuration workflow for administrators, agents, and customers.

WhatsApp configuration workflow



Common configuration steps (required for WhatsApp)

Every channel (chat, email, WhatsApp) requires the following foundational setup.

Common configuration steps

	Configuration step	Description	Role
1	Create service channel	Service channel is created automatically during plugin installation for each channel (chat, email, WhatsApp). This is the container that routes customer interactions.	System (automatic)

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Common configuration steps (continued)

	Configuration step	Description	Role
2	Create a queue	Create a queue under each service channel in Omnichannel > Administration > Queues. The queue holds interactions waiting for an available agent. Each queue has a name, description, and optional schedule for availability windows.	CSM Admin
3	Configure AWA routing	Create an assignment rule in Advanced Work Assignment that determines how interactions are routed to agents. Examples: Most Capacity (assigns to agent with most free time), Least Busy, Round Robin. Create an assignment group with agents who have the required roles (*sn_customerservice_agent*, *sn_customerservice.consumer_agent*, *awa_agent*). Link the rules and group to the queue.	CSM Admin
4	Set agent presence state	Add the channel to the Available presence state, so agents are eligible to receive interactions from that channel. Without this step, the queue has no target agents.	CSM Admin
5	Activate channel in workspace	Verify that the channel appears in the CRM Workspace. To confirm, assign a test interaction to an agent; the WhatsApp messaging UI appears only once an interaction is assigned. Agents must see the channel in their workspace interface to receive and manage interactions.	CSM Admin
6	Configure wrap-up codes	Navigate to Interaction > Wrap Up Codes to create categorization codes for interactions. Then navigate to Interaction > Wrap-up configuration to assign these codes so agents can categorize interactions for reporting.	CSM Admin

WhatsApp integration options

WhatsApp configuration follows two separate paths: WhatsApp Cloud API or Twilio. Both paths share configuration steps.

WhatsApp via Cloud API

Use this path for direct integration with WhatsApp's native Cloud API. This approach skips the Twilio go-between and relies less on outside infrastructure. Customers must maintain two separate accounts: a Meta account and a ServiceNow instance.

WhatsApp via Cloud API configuration steps

	Configuration step	Description	Role
1	Setup WhatsApp business account	Create and verify your WhatsApp Business Account and phone number with WhatsApp directly.Yuo must complete this before configuring ServiceNow.	External (WhatsApp)
2	Register with Meta	Register your organization with Meta (WhatsApp's parent company) to access the WhatsApp Cloud API. Meta provides API credentials and endpoint access needed for ServiceNow integration. Copy and save these credentials in a secure location; they might not be accessible again after setup.	External / CSM Admin

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WhatsApp via Cloud API configuration steps (continued)

	Configuration step	Description	Role
3	Configure omnichannel (shared steps)	Complete the common configuration steps in the Common configuration steps table: create queue, configure AWA routing with assignment rule and group, set channel to Available presence state, and activate channel in workspace.	CSM Admin
4	Activate Virtual Agent (optional)	For conversational integration with WhatsApp via Cloud API, enable Virtual Agent for Customer Service so predefined topics are available over WhatsApp.	CSM Admin

WhatsApp via Twilio

Use this path if your organization already works with Twilio or prefers their integration model. Twilio sits between WhatsApp and ServiceNow, handling message delivery, failover, and policy compliance. This approach doesn't support the full control features (for example, list pickers, typing indicators, or geo-location specific features) available through the Cloud API. Customers must maintain three separate accounts: Twilio, Meta, and ServiceNow.

WhatsApp via Twilio configuration steps

	Configuration step	Description	Role
1	Establish Twilio account	Set up a Twilio account and connect it to your WhatsApp Business Account. Twilio provides the messaging infrastructure between WhatsApp and ServiceNow.	External (Twilio)
2	Setup WhatsApp business account	Create and verify your WhatsApp Business Account and phone number with WhatsApp directly. This is a prerequisite for Twilio integration and must be completed before configuring ServiceNow.	External (WhatsApp)
3	Create message templates	Submit message templates for approval with WhatsApp. Any outbound message that isn't a direct reply within the 24-hour customer service window requires a pre-approved template.	External / CSM Admin
4	Configure omnichannel (shared steps)	Complete the common configuration steps in the Common configuration steps table: create queue, configure AWA routing with assignment rule and group, set channel to Available presence state, and activate channel in workspace.	CSM Admin
5	Activate Virtual Agent (optional)	For conversational integration with WhatsApp via Twilio, enable Virtual Agent for Customer Service so predefined topics are available over WhatsApp.	CSM Admin

ServiceNow Otto in Virtual Agent

Extend the WhatsApp channel with ServiceNow Otto in Virtual Agent so common customer questions resolve automatically before an interaction reaches an agent. Customers may also be able to access AI agents directly through WhatsApp self-service, without needing to reach a live agent first. The Otto branding shows that ServiceNow is bringing its AI capabilities into one interface, instead of keeping them as separate products.

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Before you configure this capability, activate the ServiceNow Otto for CSM and Now Assist in Virtual Agent plugins. For more information, see Configure ServiceNow Otto for Customer Service Management (CSM) in Virtual Agent.

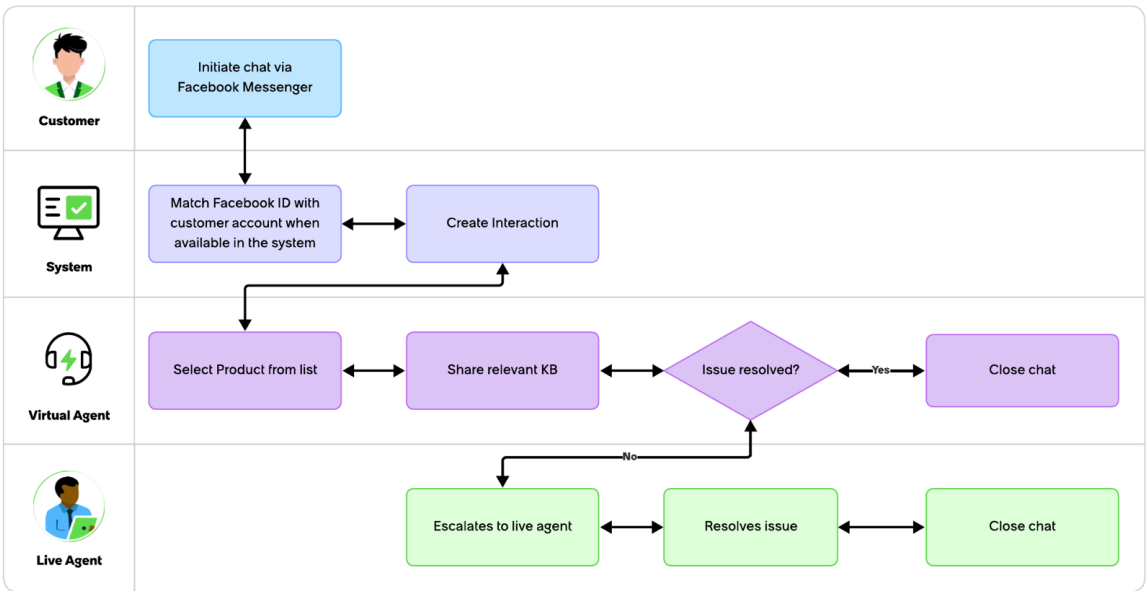
Configure Facebook Messenger

Configure Facebook Messenger as a consumer messaging channel within ServiceNow Customer Service Management (CSM). Enabling Facebook Messenger as a channel lets customers start support conversations. Those conversations route to service agents, who manage them in the CRM Workspace.

Here's an example of a customer service journey for Wi-Fi router troubleshooting showing Facebook Messenger integration with omnichannel.

A customer contacts the router manufacturer through Facebook Messenger because a new laptop can't connect to the home Wi-Fi. CSM matches the Facebook ID to the customer account when available in the system and creates a Messaging interaction. When the user is not logged in, a live agent does a lookup and verifies in the CRM Workspace to link the customer account. Virtual Agent asks the customer to select the product, then suggests relevant knowledge articles for Wi-Fi troubleshooting. The customer follows an article and reconnects the laptop, so CSM logs the interaction as resolved and closes the chat. If the issue continues, the customer can escalate to a live agent, who receives the account history, device details, and the articles already reviewed.

Facebook Messenger configuration workflow



Facebook Messenger implementation workflow

The following workflow shows how to Configure Conversational Integration with Facebook Messenger

	Configuration step	Description	Role
1	Install Conversational Integration with Facebook Messenger	Install required Plugins for Conversational integration and the Facebook Messenger application.	Admin

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	Configuration step	Description	Role
2	Set up Conversational Integration with Facebook Messenger	Integrate#Facebook Messenger with your#ServiceNow #nstance using the#Conversational Integration with Facebook Messenger application. Facebook Messenger settings: **1.** Set up a Facebook developer account **2.** Create a Facebook app **3.** Review Messenger Platform Policy and Pre-launch checklist **4.** Submit app for review **5.** Create a Facebook page within the Facebook app created earlier **6.** Enable Facebook Messenger	Admin
3	Configure and integrate Virtual Agent	Integrate the#Customer Service#Virtual Agent with#Facebook Messenger to enable virtual agent conversations in the messenger.	Admin
4	Transfer Facebook Messenger chat conversations to live agents	Configure the#Advanced Work Assignment application to transfer a#Facebook Messenger chat conversation initiated by a requester (customer contact or consumer) to a live agent.	Admin
5	Activate Advanced Work Assignment (AWA)	To implement#Advanced Work Assignment , complete these initial configuration and setup steps.	Admin
6	Set up CSM Configurable Workspace	CSM Configurable Workspace is a user interface that provides customer service agents with the tools they need to assist customers, answer questions, and resolve issues quickly and efficiently. Set up#CSM Configurable Workspace for your agents so they can engage with customers, answer questions, create cases, and resolve issues.	Admin

Configure LINE

Configure LINE integration with CSM omnichannel so customers can contact support from LINE and agents can manage those interactions in the CRM Workspace.

Here's an example of routing customer inquiries from the LINE messaging application to CSM agents.

A restaurant group uses LINE with CSM omnichannel so customers can contact support from LINE for reservations, order issues, and general questions. In the example workflow, the

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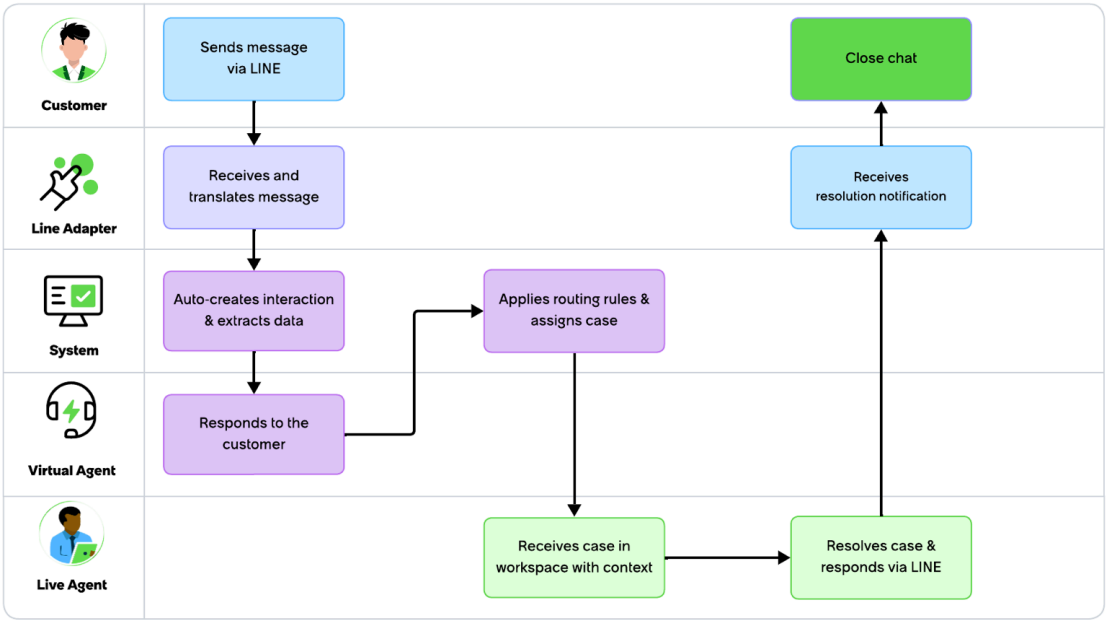
administrator configures the LINE channel, connects it to CSM, defines how customer messages create interactions or cases, and sets routing rules. The administrator also prepares CRM Workspace so agents can review the customer context, respond to the inquiry, and send updates back through LINE.

LINE configuration workflow



LINE implementation workflow

The following workflow shows how to install, configure and implement LINE messaging with CSM workflows.

	Configuration step	Description	Role
1	Install Conversational Integration with LINE	Install the Conversational Integration with LINE plugin from the ServiceNow Store.	Admin, System Admin
2	Integrating Virtual Agent with messaging apps	Review the Virtual Agent messaging app integration framework to understand supported channels, account linking patterns, and live agent transfer capabilities.	Admin
3	Configure Conversational Integration with LINE	Set up LINE Business Account credentials and OAuth tokens.	LINE Platform Mgr, Admin
4	Set up Conversational Integration with LINE	Configure the LINE channel in Conversational Interfaces Console.	Admin
5	Integrating LINE with Customer Service Management	Link LINE channel to CSM and configure interaction creation rules.	Admin
6	Capturing information from a	Configure data capture rules to extract customer information from LINE messages.	Admin

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	Configuration step	Description	Role
	user in a LINE chat conversation		
7	Configure case routing and assignment	Define routing rules to assign LINE cases to appropriate teams.	Admin
8	(Optional) AWA for CSM	Enable and configure Advanced Work Assignment (AWA) for intelligent agent assignment.	Admin
9	Set up CRM Workspace	Set up and configure the CSM workspace to integrate with the LINE application.	Admin
10	Transfer LINE chat conversations to live agents	Configure live agent handoff from Virtual Agent to CSM agents.	Admin

Configure Apple Messages for Business

Apple Messages for Business integration enables customers to start secure conversations from the Messages app on Apple devices. Agents manage these interactions in CSM Workspace with full customer context, case details, and conversation history.

Customers expect to reach support through familiar messaging channels. Apple Messages for Business integration connects the native Messages app on Apple devices to Customer Service Management (CSM) Workspace, allowing customers to start conversations without leaving their preferred messaging platform.

When a customer starts a conversation through Apple Messages for Business, the CRM Workspace creates an interaction and links it to the customer's profile, case history, and conversation context, when available. When the user is not logged in, a live agent does a lookup and verifies in the CRM Workspace to link the customer account. Agents can accept these conversations as work items, review related information, and respond without losing conversation history. Virtual Agent can handle initial requests, and Advanced Work Assignment (AWA) routes escalated conversations to appropriate agents.

Customers can use Apple Messages for Business to ask questions, resolve issues, schedule appointments, or make purchases. Conversations can transition between automated and agent-assisted support without losing context. This integration reduces channel switching and provides consistent service across support experiences.

Here's an example of a customer service journey using Apple Messages for Business application for omnichannel, seeking shopping assistance with virtual and live agents.

Maya, a premium customer, starts an Apple Messages for Business conversation with Luxe Boutique Collective to get help selecting a gift. CSM creates an interaction, associates it with Maya's profile, purchase history, and conversation history, and starts the flow with Virtual Agent.

Virtual Agent asks qualifying questions, suggests products, checks availability, and offers self-service appointment options. When the Virtual Agent can't resolve the request, the conversation escalates with the transcript and context preserved. AWA routes the work item to Jordan, a live agent, who reviews the context in CSM Workspace and consults Priya, a product specialist, for recommendations.

Priya shares product details and images. Jordan sends appointment options. Maya completes the purchase using Apple Pay. The full interaction remains available for future follow-up across automated and agent-assisted support.

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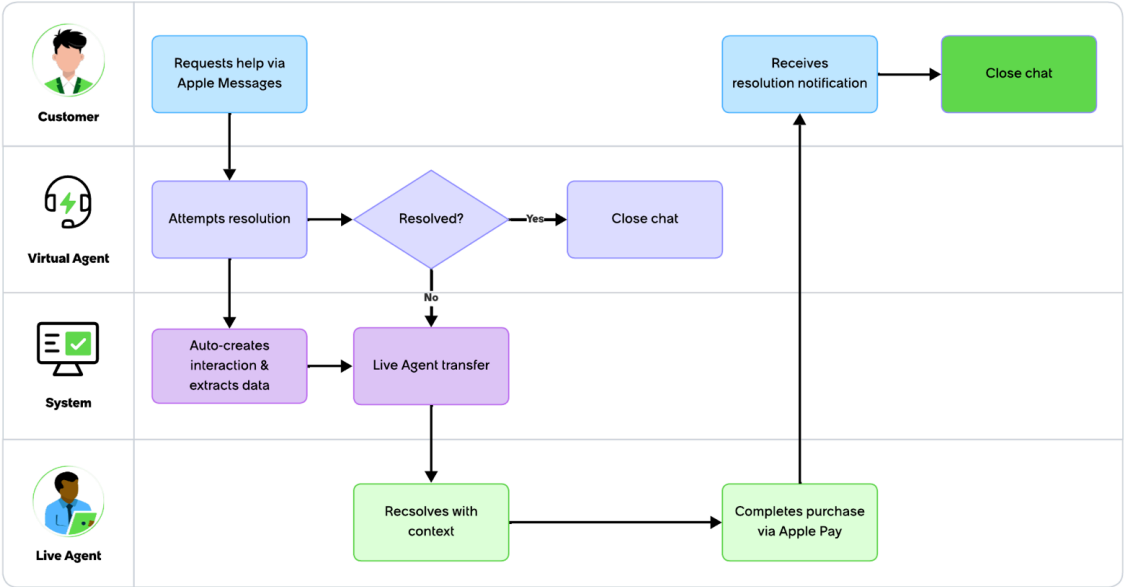
Apple Messages for Business configuration workflow



Apple Messages for Business implementation workflow

Complete these tasks to implement Conversational Integration with Apple Messages for Business. See Exploring Conversational Integration with Apple Messages for Business for more information.

	Configuration step	Description	Role
1	Install Conversational Integration with Apple Messages for Business	Install the Conversational Integration with Apple Messages for Business plugin from the ServiceNow Store.	Admin, Sys Admin
2	Integrating Virtual Agent with messaging apps	Review the Virtual Agent messaging app integration framework to understand supported channels, rich control capabilities, and live agent transfer patterns.	Admin
3	Set up the integration on Apple Messages for Business	Create and configure Apple Business Register account and obtain the Business ID.	Admin
4	OAuth setup for Apple Messages for Business	Set up OAuth authentication credentials between Apple and ServiceNow.	Admin
5	Integrating the Conversational Integration with Apple Messages for Business app with other applications	Link the Apple Messages for Business channel to CSM and configure auto-creation rules.	Admin
6	Capturing information from a user in a Apple Messages for Business chat conversation	Configure data extraction for customer profile from Apple Messages.	Admin
7	Set up CRM Workspace	Design workspace with agent profile cards, rich media widgets, and loyalty status.	Admin

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	Configuration step	Description	Role
8	Transfer Apple Messages for Business chat conversations to live agents	Configure smooth handoff from Virtual Agent to a live agent.	Admin

Note: An admin can configure Rich Controls for Apple Messages. This enables setting up interactive controls for images, appointment pickers, and Apple Pay integration.

Configure chat channel

Configure chat as a real-time messaging channel within ServiceNow Customer Service Management. Customers can start live conversations from your web portal. Conversations route to available agents and are managed through the CRM Workspace alongside email, messaging, and phone.

Here's an example of a customer service journey combining chat support with omnichannel.

Rajesh is a customer service manager at a financial services company struggling with chat request delays and poor routing. The team uses multiple tools to manage different channels, and chat requests often get missed or assigned to agents without the right skills. After setting up ServiceNow omnichannel with the chat channel, the team can now handle chat conversations directly in the CRM Workspace alongside email and phone interactions.

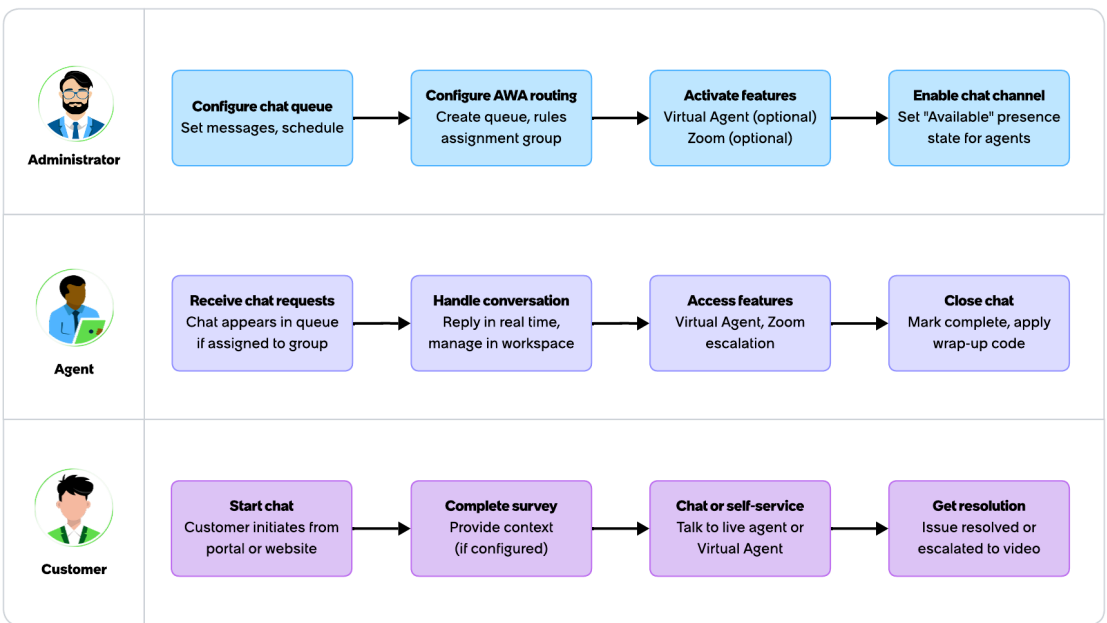
With chat configured, the team benefits from skill-based routing, unified queue management, and Virtual Agent escalation.

Customers get quicker resolutions through real-time conversations without delays. Agents see chat requests only in their assigned queues, and Rajesh has centralized control over chat schedules, escalation paths, and Virtual Agent topics.

After the team set this up, first-response time improved, and Rajesh got the visibility needed to manage chat as a first-class channel alongside email, messaging, and phone.

The following diagram shows the Chat configuration workflow for administrators, agents, and customers.

Chat configuration workflow



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Common configuration steps (required for chat)

Every omnichannel channel (chat, email, WhatsApp) requires the following foundational setup.

Common configuration steps

	Configuration step	Description	Role
1	Create service channel	Service channel is created automatically during plugin installation for each channel (chat, email, WhatsApp). This is the container that routes customer interactions.	System (automatic)
2	Create a queue	Create a queue under each service channel in Omnichannel > Administration > Queues. The queue holds interactions waiting for an available agent. Each queue has a name, description, and optional schedule for availability windows.	CSM Admin
3	Configure AWA routing	Create an assignment rule in Advanced Work Assignment that determines how interactions are routed to agents. Examples: Most Capacity (assigns to agent with most free time), Least Busy, Round Robin. Create an assignment group with agents who have the required roles (*sn_customerservice_agent*, *sn_customerservice.consumer_agent*, *awa_agent*). Link the rules and group to the queue.	CSM Admin
4	Set agent presence state	Add the channel to the Available presence state, so agents are eligible to receive interactions from that channel. Without this step, the queue has no target agents.	CSM Admin
5	Activate channel in workspace	Verify the channel appears in the CRM Workspace. Agents must see the channel in their workspace interface to receive and manage interactions.	CSM Admin
6	Configure wrap-up codes	Navigate to Interaction > Wrap Up Codes to create categorization codes for interactions. Then navigate to Interaction > Wrap-up configuration to assign these codes so agents can categorize interactions for reporting.	CSM Admin

Chat-specific configuration steps

Note: ServiceNow is migrating from NLU-based Virtual Agent to NAVA (Now Assist Virtual Agent) for chat interactions. This topic reflects the current NLU-based configuration steps; NAVA configuration details will be added once available, starting with the Canada release. NAVA is part of ServiceNow's broader Now Assist and Otto AI experience.

Chat-specific configuration steps

	Configuration step	Description	Role
1	Set queue parameters	Configure the opening question, initial agent response, not-available message, and maximum queue time before rerouting.	CSM Admin
2	Set up Pre-Chat Surveys (optional)	Two preconfigured surveys exist: CSP Pre-Chat Survey (logged-in customers) and CSP Anonymous Pre-Chat Survey (anonymous users). These aren't active by default and require the com.glide.service-portal.consumer-portal and com.glide.cs plugins.	CSM Admin

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Chat-specific configuration steps (continued)

	Configuration step	Description	Role
3	Activate Virtual Agent	Install the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) to access predefined chatbot topics: Check Case Status, Get Service Request Status, and Receive Bill/Invoice. Activate Virtual Agent to resolve common questions automatically before they reach an agent.	CSM Admin
4	Enable video or screen-share escalation (optional)	Install the Chat Zoom Connector application. Integrate your Zoom account, set up the Notify Zoom connector to link Zoom meetings to Notify, install the Chat Zoom Connector integration, and activate.	CSM Admin

Pre-chat surveys

Use pre-chat surveys to capture preliminary information from a customer. From the responses received, Advanced Work Assignment (AWA) routes chat conversations to appropriate queues and groups. Before entering into a chat conversation, the assigned agent can review the context of the issue.

Pre-chat features

Pre-chat surveys provide the following advantages that help agents efficiently handle chat conversations:

Preconfigured pre-chat surveys

Pre-chat surveys determine the pre-chat questions presented to users. Preconfigured surveys are activated by default in the base system, but in order to avoid conflicts with previous configurations, customers who have upgraded have to manually activate them. These preconfigured surveys are:

- CSP Pre-Chat Survey - Collects preliminary information for logged-in customers.
- CSP Anonymous Pre-Chat Survey – Collects preliminary information for users who are not logged in.

You can define a different survey or modify these predefined surveys. For more information, see Create chat surveys.

Routing chats to the correct queue

Advanced Work Assignment (AWA) leverages information captured through pre-chat surveys to route a chat to the right queue. For more information, see Work item queues.

Identifying topics related to the chat issue

When customers enter a response to the standard pre-chat question "Please briefly describe your issue," Natural Language Understanding can help determine the appropriate Virtual Agent conversation topic. Relevant topics are automatically displayed to end users (requesters) rather than prompting them to choose from a list of conversation topics. For more information, see Define context topic intent configurations.

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Configuring Pre-chat if you have upgraded

Some settings need to be configured if you have upgraded your ServiceNow® instance. For more information, see Configure pre-chat after upgrading.

Plugins

You must activate the Consumer Service Portal (com.glide.service-portal.consumer-portal) and Glide Conversation Server (com.glide.cs) plugins. To activate the plugins, see Activate a plugin.

Related topics

Pre-chat from the Consumer Service Portal

Configure the customer service chat queue

Define the customer service agents, default chat messages, schedule, and escalation path for the customer service chat queue.

Before you begin

Role required: admin

About this task

The Customer Service Management chat communication channel uses the ServiceNow Connect Support feature.

Procedure

1. Navigate to **All** > **Collaborate** > **Administration** > **Queues**.
2. Select **Customer Service** from the Chat Queues list.
3. Fill in the fields, as appropriate.

Chat Queue form

Field	Description
Name	Name of the queue.
Active	Not used in Connect.
Assignment group	User group that contains the support staff for the queue. Any user in the group can view the queue in the Connect sidebar and accept chats. No other users can access the queue. This field must be populated.
Average wait time	Average time it takes for an agent to accept a chat in the queue. This value is automatically calculated. Do not manually edit.
Confirm problem	Not used in Connect.
Escalate to	Different queue to which an agent can escalate a chat. For example, there is a queue for high priority support chats. When a queue is defined in this field, agents can access the **Escalate** option in conversations.
Initial agent response	Message that users see when an agent accepts their chat. For example, **Thank you for contacting support. We are looking into your question now and will be with you shortly.**
Not available	Message that users see when they attempt to start a chat outside the defined queue **Schedule**. You can use HTML to format the message and include links or media.

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Field	Description
Question	Initial phrase that users see when they start a new chat in the queue. For example, **How can I help you?**
Schedule	Schedule that defines when the queue is available. Leave the field blank to make the queue available all the time. Users cannot start a new conversation in the queue outside the schedule hours.

4. Click **Submit**.

Related topics

Connect Support

Activate Virtual Agent for Customer Service Management

Activate Virtual Agent for CSM to use the predefined Customer Service Virtual Agent topics (chatbot conversations) designed to help your customers complete common self-service tasks.

Before you begin

The Virtual Agent plugin (com.glide.cs.chatbot) must be activated. If the Virtual Agent isn't currently activated, contact ServiceNow to activate it.

Role required: admin

Procedure

Activate the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent) to access the predefined Customer Service topics.

Customer Service Virtual Agent conversations

Predefined Customer Service Virtual Agent chatbot conversations enable your customers to get help with the product. Integrating Natural Language Understanding (NLU) models with your virtual agent chatbot topics enables chatbots to analyze, understand, and navigate the user to the right topic based on the inferred intent.

A conversation topic defines the dialog between the Virtual Agent (chatbot) and the user to accomplish a specific goal.

Activating Virtual Agent conversations

The system administrator or a virtual agent admin must do the following to enable the chatbot conversations:

- Enable the Glide Virtual Agent plugin (com.glide.cs.chatbot).
- Enable the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent).
- Publish the following read-only pre-defined virtual agent chatbot topics and topic blocks:

  Note: You can duplicate a topic and then customize it.

  - Check Case Status (Template)

    Users can search cases and check the status of an existing case.

  - Get Help with a Product (Template)

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Users can get help on an issue with a product, search relevant knowledge articles, or create a case for the issue.

- Get Help (Template)

  This topic is for users who are not logged in and want to chat anonymously. Users can use keywords and search relevant knowledge articles or choose to be transferred to a live agent. You can integrate this topic with the Virtual agent - Facebook messaging integration to enable chat using your messaging application.

- Get Help with an Order (Template)

  Users can get help on an issue with an existing order, search relevant knowledge articles, or create a case for the issue.

- Submit Request (Template)

  Users can submit a request for searching and using one of the catalog items.

- Create Case

  Creates a case from Virtual Agent when no relevant topics for the issue you have are displayed.

- Update Case

  Users can update a case from Virtual agent.

Your users can run the published topics in your chat support client.

Activating Virtual Agent conversations with NLU

- The Customer Service NLU Model for Virtual Agent Conversations (com.sn_csm.nlu) plugin is automatically enabled when you enable the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent).

  After you enable the plugin, you can view the following read-only intents for the Customer Service NLU for VA models in Studio:

  - CheckCaseStatus
  - GetHelp
  - GetHelpWithProduct
  - GetHelpWithOrder
  - SubmitRequest

  Each intent corresponds to a chatbot topic. To customize an intent, you can import an existing intent from the Customer Service NLU for Virtual Agent model and then link the NLU model with the associated intent for the topic.

- Enable ServiceNow NLU in the general settings.

Related topics

Get help using virtual agent conversations

Natural Language Understanding in Virtual Agent

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Integrate Customer Service Management Virtual Agent with Facebook Messenger (Legacy)

Integrate the Customer Service Virtual Agent with Facebook Messenger to enable bot conversations in the messenger.

Before you begin

Role required: virtual_agent_admin or admin

- Install the Case Management Core (com.sn_customerservice) plugin.
- Install the Customer Service Virtual Agent Conversations plugin (com.sn_csm.virtualagent).
- Make sure Virtual Agent is integrated with Facebook Messenger.
- Make sure you have the token and secret for the messenger.

For information on integrating the Virtual Agent with Facebook Messenger and for retrieving the messenger token and secret, see Set up Virtual Agent integration for consumer messaging apps .

About this task

With this integration, you can get help using Virtual Agent chatbot conversations. For more information on getting help, see Customer Service Virtual Agent conversations .

Procedure

1. In the application navigator, enter `sys_cs_adapter_configuration_page_messenger_list.do`
2. Select **sample-fb-messenger-app**.
   You have to be in the **Customer Service Virtual Agent Conversations** application to edit the record.
3. In the **Messenger Page ID** field, enter your company's Facebook page ID.
4. Right-click and select **Save**.
5. In the **Provider Auth** field, click the information icon and open the **Message Auth** record:
   - Go to the **Outbound message creation** field, click the information icon and open the **Token Verification** record.
   - In the **Token** field, enter the token for the messenger application.
   - Click **Update**.
6. In the **Message Auth** record:
   - Go to the **Inbound message verification** field, click the information icon, and open the **Hash Message Verification** record.
   - In the **Secret** field, enter the app secret for the messenger application.
   - Click **Update**.

Configure pre-chat after upgrading

If you have upgraded, some settings need to be configured to use pre-chat effectively.

Before you begin

Role required: admin

About this task

For information about using pre-chat surveys to capture preliminary information from a customer, see Pre-chat surveys. If you have upgraded, you must manually adjust some settings to use Pre-chat most effectively.

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Procedure

1. Make the predefined pre-chat surveys active.
   a. Navigate to **Conversational Interfaces** > **Pre-Chat Survey**.
   b. Select the CSP Pre-Chat Survey, which collects preliminary information for logged-in customers.
   c. In the form, select **Active**.
   d. Click **Submit**.
   e. Repeat this process for the CSP Anonymous Pre-Chat Survey, which collects preliminary information for users who are not logged in.
2. Disable the legacy form-based chat widget from appearing in the portal header.
   a. Type *sys_properties_list.do* from your instance.
   b. Search for the *csp.legacy_chat* property.
   c. Set the property value to **true**.
   d. Click **Update**.
   The **Chat** option from the portal header is disabled.
3. Include the chat widget to appear on the Consumer Service Portal page.
   a. Navigate to **Service Portal** > **Agent Chat**.
   b. Click **CSP Chat**.
   c. Select **Active**.
   d. Click **Submit**.
   The Open chat window icon that customers can use to initiate the pre-chat survey and connect with an agent will appear in the portal header.

Set up Engagement Messenger

Understand the stages involved in setting up Engagement Messenger before you add it to your customer service web portal.

After you install the Engagement Messenger application in your instance, you're ready to configure it. You can also watch the academy video to understand the overall functionality of Engagement Messenger.

The configuration process involves the following tasks:

1. Install the Engagement Messenger application from the ServiceNow® Store.
2. Create Engagement Messenger module.
   - Configure the theme and styling of how Engagement Messenger appears to your customers
   - Configure how Engagement Messenger behaves when your customer uses it
   - Configure how Engagement Messenger works for your customers

   For more information, see Configure Engagement Messenger.
3. Create identity providers to enable an authenticated user experience. See Create an identity provider (IdP) for Engagement Messenger.

   If you want to enable only a guest user experience for your customer service portal, you can ignore this step and move on to step 4.

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4. Create cross-origin resource sharing (CORS) rules for the REST API. See Configure a CORS rule for Engagement Messenger.
5. Add HTTP response headers for your Engagement Messenger. See Create HTTP response headers for Engagement Messenger.
6. Configure the system properties to enable virtual agent chat, multi-provider SSO, and to set a user session time-out value. For more information, see Engagement Messenger properties.
7. Configure a custom URL to load Engagement Messenger on third-party websites. For more information, see Enable Engagement Messenger on a website when third-party application cookies are blocked.
8. Configure the deep linking feature to launch a specified feature in Engagement Messenger. For more information, see Deep linking feature in Engagement Messenger.
9. Activate an Engagement Messenger module.
10. Embed Engagement Messenger in your web application.
11. Embed messenger in your native iOS mobile app using Now Mobile® SDK. For information, see the Embed Engagement Messenger in a native iOS app using Now Mobile SDK [KB1587276] article in the Now Support Knowledge Base.
12. Embed messenger in your native android mobile app using Now Mobile® SDK. For more information, see the Embed Engagement Messenger in a native android app using Now Mobile SDK [KB1587611] article in the Now Support Knowledge Base.

Engagement Messenger for Customer Service Management

By using the ServiceNow® Engagement Messenger application, your customers use self-service to find the information or service that they need from your third-party web applications that are outside of the ServiceNow environment.

Request apps 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.

Engagement Messenger benefits

With the Engagement Messenger application, you can manage how your customers use your web applications and services from one central location. You can also configure the behavior and styling of the messenger and deploy the configuration on the websites or mobile sites of your choice.

Engagement Messenger provides the following benefits:

- Let your customers access your services from within an integrated messenger in your third-party websites.
- Integrate customer support capabilities via a no or low-code configuration.
- Meet your customer needs faster with these pre-packaged features:
  - Case management including case types
  - Service catalog requests
  - Virtual and live agent chat
  - Field service management
  - Appointment booking for field service

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- Walk-up appointment booking
- Knowledge article search that is powered by ServiceNow® AI Search

For more information about the Engagement Messenger application, see Features of Engagement Messenger.

To get started with the Engagement Messenger application, see Set up Engagement Messenger.

Features of Engagement Messenger

Understand what the Engagement Messenger application can provide to your customers.

After you create and configure the Engagement Messenger module, you can customize it for your customers. For example, you can change the display order of any of these features on the home page of the messenger. Also, you can enable or disable any of these features to suit your customer's needs.

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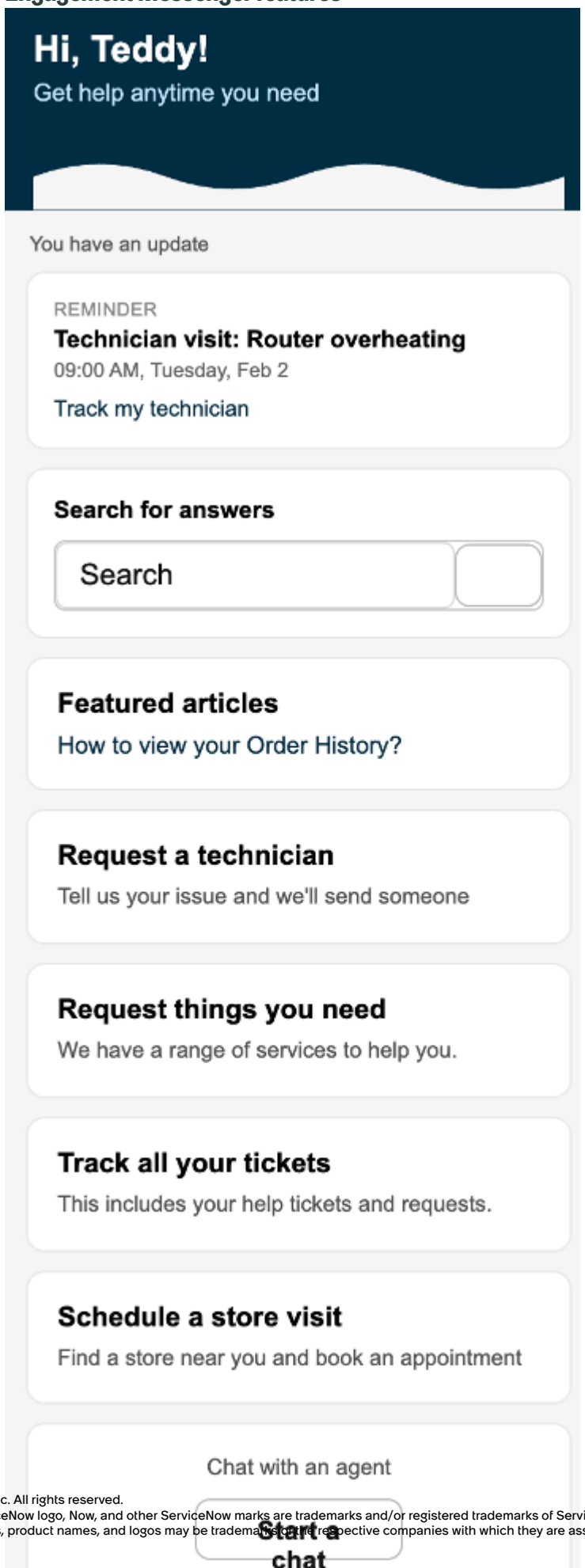
Engagement Messenger features



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Greeting

You can display the user greeting, which also includes a greeting message, on the header of the messenger. You can customize the way you want to greet your guest users and the users who sign in to your website.

Knowledge

You can select a knowledge base for your search results or choose to display featured articles on the home page of the messenger. You can also add multiple knowledge bases to suit your customer base.

Note: To add knowledge bases to the Engagement Messenger module, you must manually assign the knowledge_admin role to the Engagement Messenger admin [sn_csm_ec.ec_admin] user.

Search

The ServiceNow® AI Search capability that is used in the Engagement Messenger application uses the knowledge bases that you selected for your messenger.

When a customer searches for information using the Search widget, the displayed results are from the articles in the knowledge bases associated with your messenger module.

Customers can open the articles from the search results to get the information they need. They can also provide feedback to the article directly from the messenger to indicate whether the article was helpful or not. This feedback helps you to understand which articles are the most helpful so that you can improve those articles that weren't helpful.

Note:

- If the Service Portal - Restricted Pages plugin (com.glide.service-portal.pages.restricted) is activated in your ServiceNow instance, AI Search functionality will not work in Engagement Messenger for unauthenticated users.

  If this plugin is not activated, then the AI Search functionality works for both unauthenticated and authenticated users.

- You must configure AI Search in your ServiceNow instance. Then enable Typeahead Search and AI Search Assist widgets so that unauthenticated users can use the AI search feature from Engagement Messenger.

  For more information on enabling Typeahead Search and AI Search Assist widgets for Engagement Messenger, see Enabling AI search in the Customer and Consumer Service Portals for unauthenticated users.

  For more information of AI Search configuration, see Configuring AI Search.

Case management

You can manage your customer cases on the messenger. This feature is available only for authenticated users of your website.

By using the Cases widget on the messenger, your customers can submit a case to request help with something or to report an issue. Submitted cases can be assigned to a customer service agent and tracked to a resolution.

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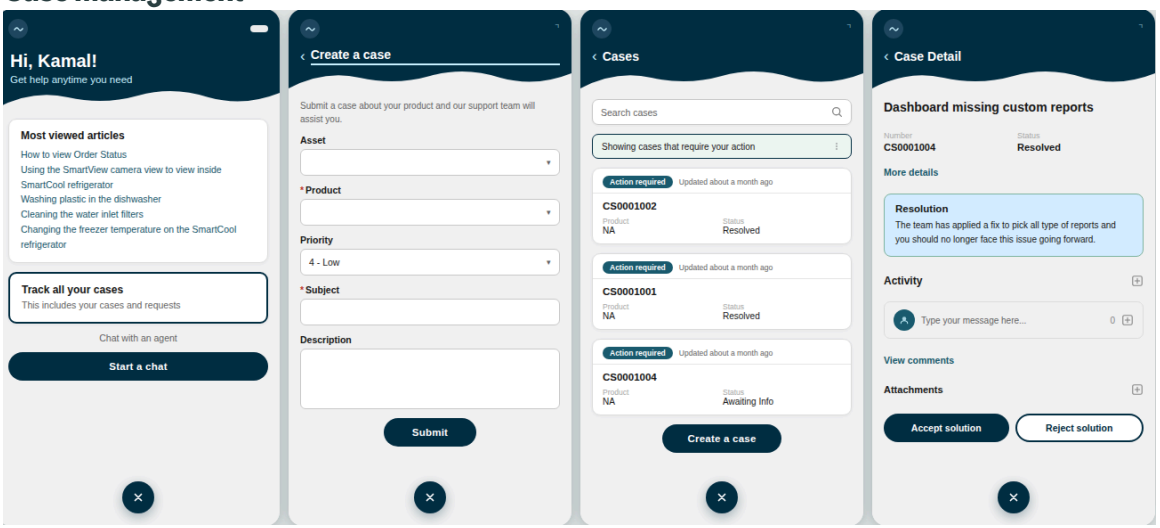
Case management



Whenever your customers return to the customer portal and log in, they are notified of any updates to the cases that they created. They can also view the details of all the cases and requests that they have previously submitted and track their status.

Some cases require action from the submitted user. They may need to provide more information about the help they need or review a solution that the support team has provided. Customers can perform all these actions directly from within the messenger.

Catalogs

You can associate pre-defined catalogs with your Engagement Messenger. Customers can browse through the list of available catalog items. From this list of catalog items, they can choose to request a service or create a ticket. The requests that the customer makes can be tracked to a resolution using the case management feature.

Whenever your customers return to the customer portal and log in, they are notified of any updates to the requests that they have previously submitted.

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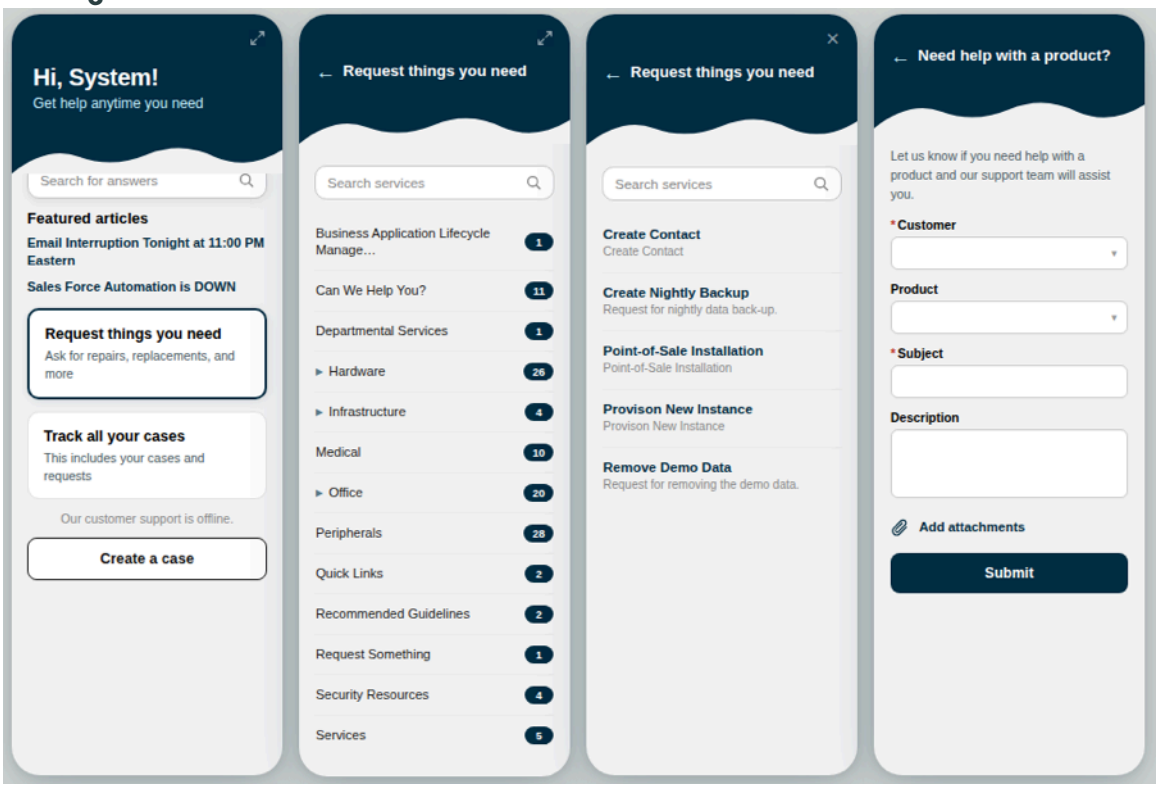
Catalog feature



Field service management

The field service feature enables your customer to request a technician visit to service their issue. By selecting a product or service that they need help with and their location, customers can submit a request for a technician visit. While submitting the request, customers can also add supporting attachments to help the support team understand the issue before a technician is assigned.

All technician requests are stored as work orders in your ServiceNow instance so that they can be tracked to completion.

The Work Order will have the location where the customer has raised a request. Geo-location services must be enabled for the technicians so that customers can track the live location and know the estimated time of arrival (ETA) of their technician. For more information, see Field service feature configuration.

Note:

- Verify that the Field Service Management - Customer Experience plugin (com.snc.fsm_customer_experience) is active in your ServiceNow instance.
- The field service feature is available only for users who log in to the Engagement Messenger and not for guest users.

Walk-up appointments

The walk-up feature enables your customers to book an appointment to visit one of your stores, service centers, and the like. Customers can view the support centers near them and select one to schedule an appointment to visit. Once an appointment is scheduled, customers receive a confirmation email.

Customers who log in into your website can view a list of scheduled appointments directly from this widget on the Engagement Messenger home page. They can

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modify or cancel existing appointments. They also receive notification emails on the following status of their walk-up appointment:

- They're ready to be assisted by an associate of the support center
- A walk-up interaction is assigned to an associate of the support center
- A walk-up interaction is closed

Customers who don’t log in can use the confirmation email to view and modify their appointments.

Note: To enable a walk-up feature for your customers, verify that you activate the following plugins in your ServiceNow instance:

- Walk-up for CSM plugin (com.snc.walkup_for_csm) for authenticated users
- Guest Walk-up Experience for Customer Service plugin (sn_guest_walkup_cs) for unauthenticated users

Virtual and live agent chat

The chat feature enables support agents to interact with customers to resolve their issue. Agents can create incident or case records or transfer chats to another agent or queue if needed. Chat feature support is enabled for both authenticated and guest (unauthenticated) users.

Virtual and live agent chat

Customers can use the Chat widget on the messenger to interact with a virtual or live customer support agents in your organization. This way, your customers can get immediate responses to their queries or issues.

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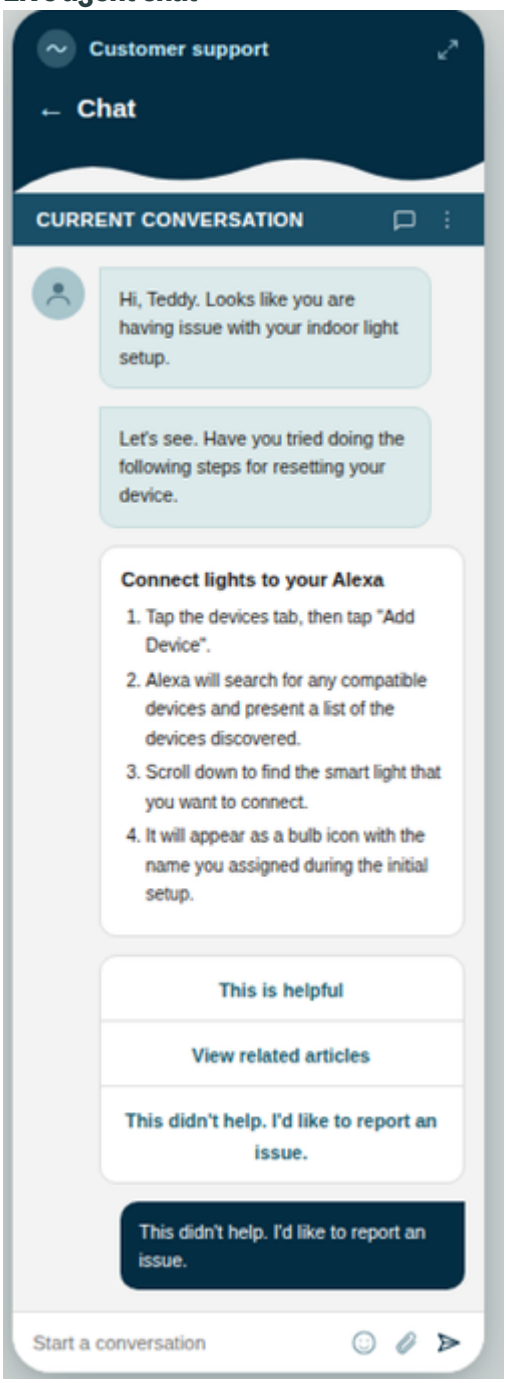
Live agent chat



Engagement Messenger also provides contextual chat functionality. From any case details page, your customers can directly start a chat that opens with the context of that specific case.

> **Note:** Chat is available when you activate the Glide Virtual Agent plugin (com.glide.cs.chatbot) and set the *`com.glide.cs.embed.csp_frame_ancestors`* system property value to **'self' <your website URL>**.

Now Assist in Virtual Agent with Engagement Messenger

Now Assist in Virtual Agent offers a conversational support experience that improves the chat experience in Engagement Messenger by delivering prompt answers to user questions. When enabled,

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Now Assist in Virtual Agent provides your users with an interactive generative AI experience. A friendly, natural language conversation that is easier to understand and helps users to be more comfortable with chatting to a bot.

By integrating generative AI chat capabilities, Now Assist in Virtual Agent enhances the user experience in Engagement Messenger. It improves asynchronous messaging, enabling users to resolve issues more quickly and efficiently. These capabilities help speed up issue resolution and increase efficiency by reducing the number of incoming queries that must be diverted to a live agent. To know more about Now Assist in Virtual Agent, see Using ServiceNow® Otto for Virtual Agent.

Getting started with Now Assist in Virtual Agent in Engagement Messenger:

- To enable Now Assist in Virtual Agent chat support in Engagement Messenger, verify that the Now Assist in Virtual Agent experience is configured by virtual_agent_admin or admin. For more information, see Assistants overview.
- You can create or use an existing assistant by navigating to **All** > **Conversational Interfaces** > **Assistants**. For more information, see Create a chat assistant.
- Once you select an assistant navigate to the **Display experience** tab to configure the Engagement Messenger module. In the **Portals** tab, select the Engagement Messenger module from the **Add portal** list and select the **Standard chat** as the experience. For more information, see Display your assistant on a portal, channel, or mobile app.

Note: Each assistant comes with its own search configuration. For a smooth experience, if the assistant appears on a portal or mobile app that already has AI search configured, consider duplicating that setup to maintain consistency.

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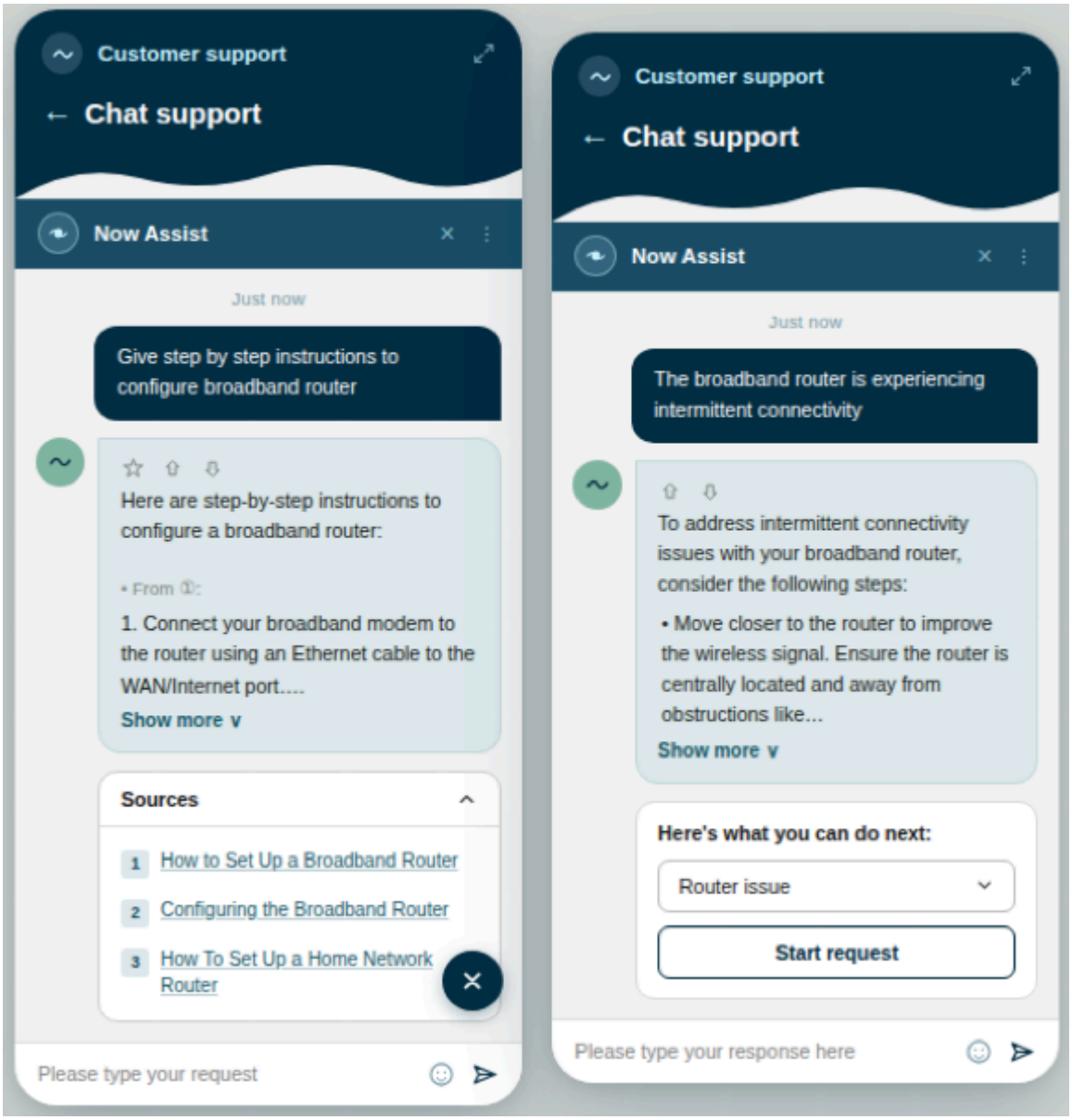

Asynchronous chat

Engagement Messenger supports communication at different time intervals, enabling your support agents and end users to participate in long-running conversations without having to be online at the same time. For more information about asynchronous conversation, see Asynchronous Chat.

Configure asynchronous chat on Engagement Messenger by setting the web client as a messaging channel. For more information, see Configure asynchronous chat for the web channel.

Message preview

- Enable preview to see previews of unread chat message text, tables, links, HTML content, cases, knowledge cards, and images shared by the support agent without opening a message. The complete HTML content or video, and multiple unread messages, can be seen only when the user accesses the message.

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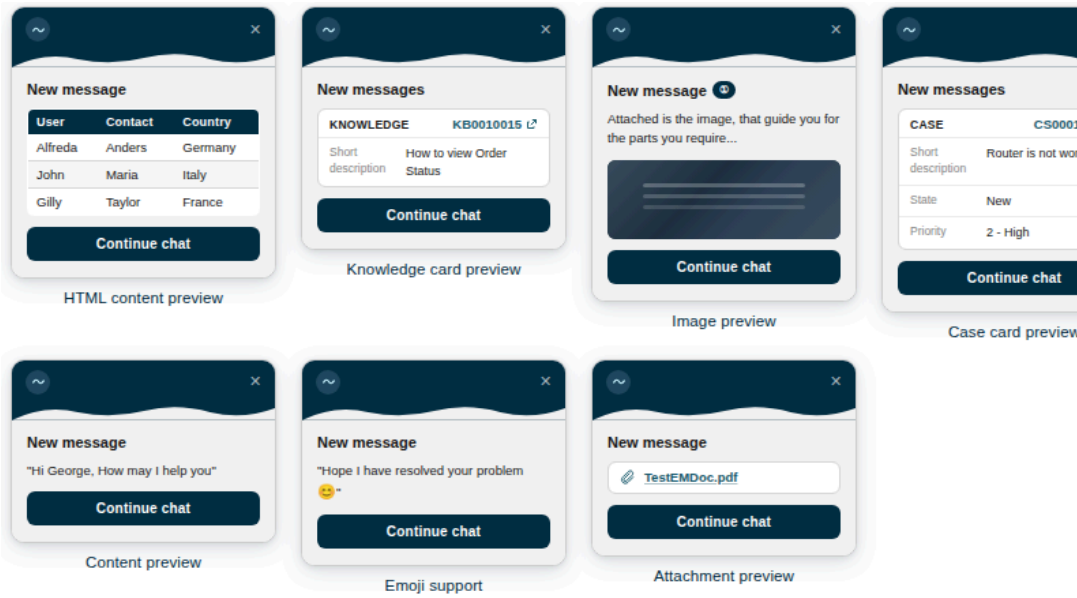
- Asynchronous chat supports emojis sent by an agent in the message preview for a more interactive conversation. For more information on how to use emojis in Agent chat, see Using emojis in Agent Chat.

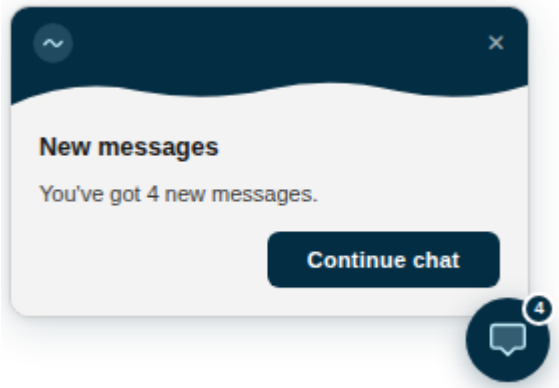
Previews



Offline message support

Offline chat support enables users to view messages sent by the support agent while they were offline. The chat widget notification shows the total number of unread messages in real-time when the user revisits the website.

Offline message support



Chat messages history

Users can close and reopen the chat window as needed without losing context or progress so an accidental messenger closure doesn't reset the chat session.

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Note: You can set a specific timeout to manage the idle conversation. By default, if the requester doesn't respond to an agent message within two days, the conversation status changes to Closed Abandoned and the chat session is ended. As an admin, you can override the conversation idle timeout period for a web channel by setting the value in the Conversation Idle Timeout field in the Messaging Channels [sys_cs_channel] table. For details, see Closing Virtual Agent and Live Agent conversations.

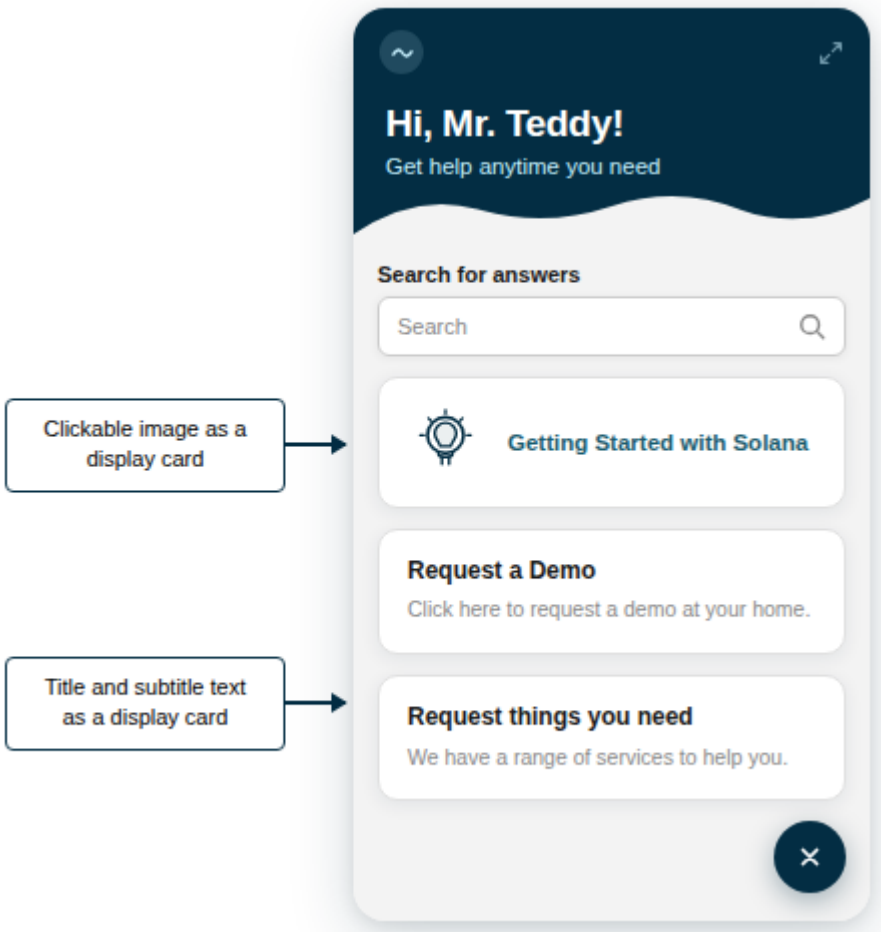
Configurable Cards

The Configurable Cards enables you to add custom features to Engagement Messenger. It enables Engagement Messenger to serve as a one-stop solution for accessing all the information. You can embed portal page, featured links, and data from any table on the messenger using the Configurable Cards.

Portal page feature card

Allows you to embed any portal page or catalog item on Engagement Messenger. The embedded page opens within the messenger when the user selects the feature card.

Portal configuration



Featured links

Enables you to add a list of links to website on Engagement Messenger. The link opens in a new browser tab when accessed using the feature card on messenger's home page.

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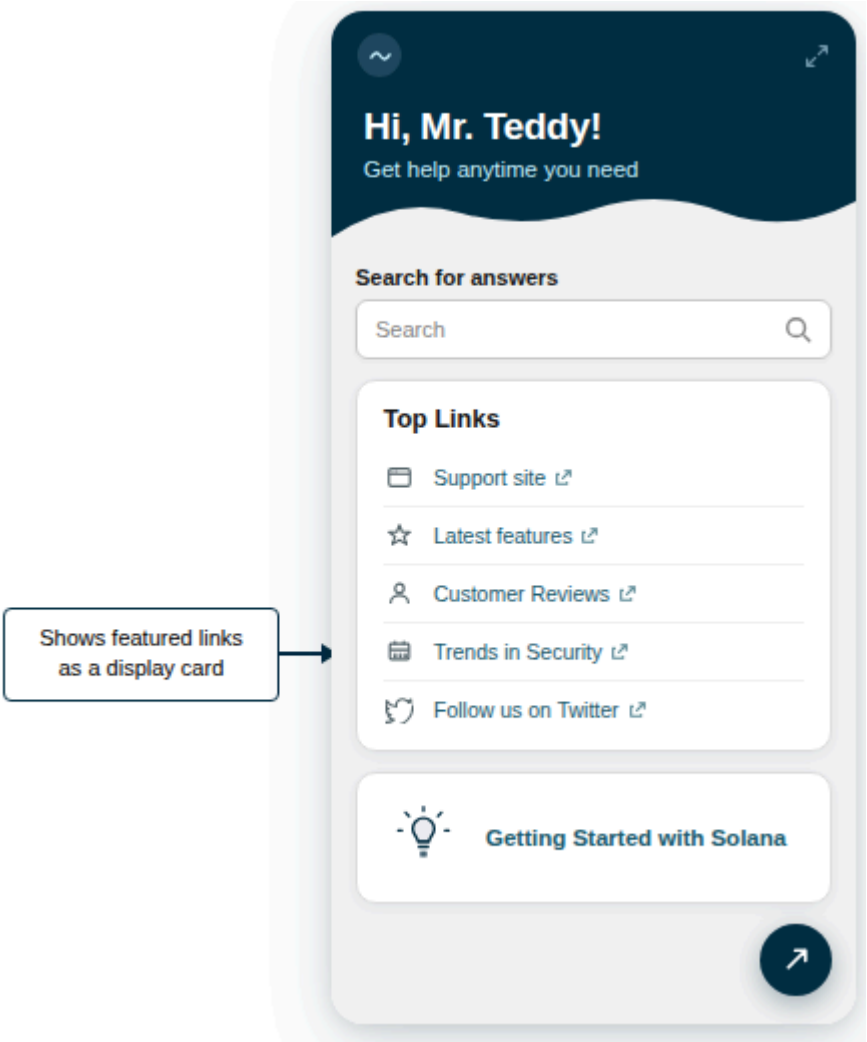
Featured links



Data from any table feature card

The feature card enables you to embed data from any table on Engagement Messenger. The added records appear as a card with a title or links on a messenger's home page.

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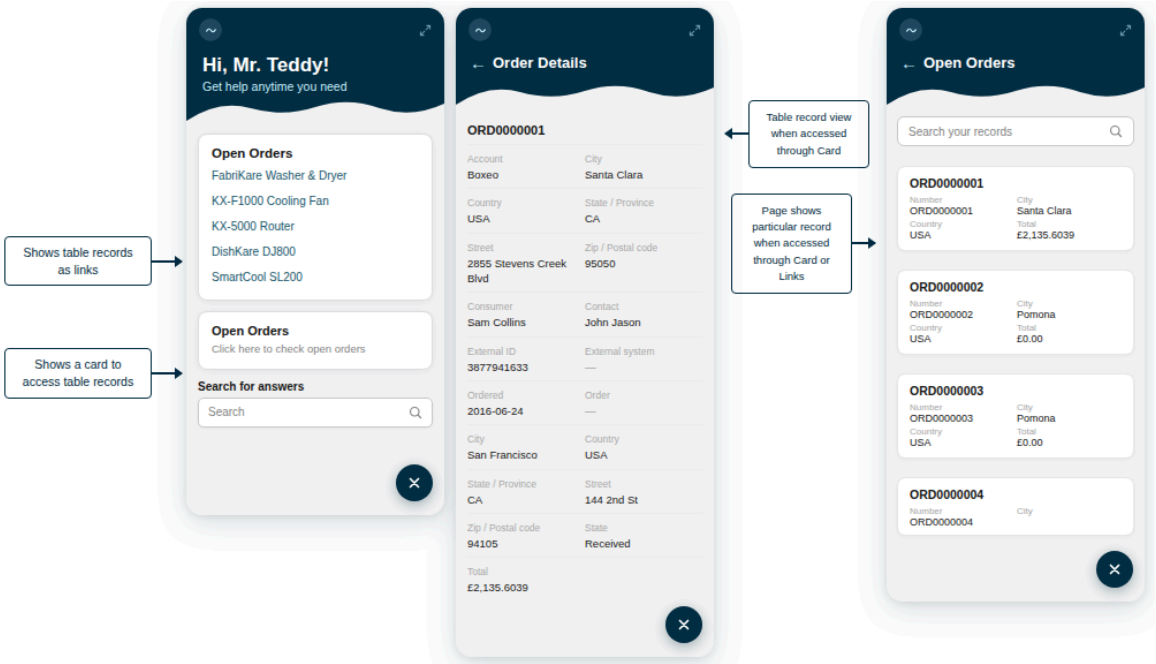
Data from any table



Proactive updates and reminders

Engagement Messenger provides your customers updates and reminders in the following scenarios so that you can keep your customers updated even if they are not accessing the messenger directly.

- Reminder for an upcoming walk-up appointment, according to the walk-up feature configuration
- Reminder for an upcoming technician visit
- Updates on a case
- Update on a chat

According to the configuration of Engagement Messenger behavior, the count of the updates is displayed on the messenger widget on your customer support webpage. If the customer navigates away from your website, the count of updates is also displayed on the browser tab.

To learn how to start configuring Engagement Messenger for your third-party website, see Set up Engagement Messenger.

Related topics

Exploring AI Search

Case management for Customer Service Management

Virtual Agent

Using Walk-up Experience

Knowledge Management

Field Service Management

Install the Engagement Messenger application

Install the Engagement Messenger application from the ServiceNow Store if you have the admin role.

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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

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Engagement Messenger application (sn_csm_ec) 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 might 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.

   Dependent plugins and applications are listed if they'll be installed, are currently installed, or must be installed. If any plugins or applications must be installed, you must install them before you can install the Engagement Messenger application.

4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Result

The following items are installed with Engagement Messenger:

- Plugins
- Roles
- Tables

For more information, see Components installed with Engagement Messenger.

What to do next

- If you want to enable Virtual Agent chat support in the Engagement Messenger, activate the Glide Virtual Agent plugin (com.glide.cs.chatbot).

  For more information, see Activate Virtual Agent.

- Get started with Engagement Messenger. For more information on how to get started, see Set up Engagement Messenger.

Configure Engagement Messenger

Create a Engagement Messenger module and configure its behavior, appearance, and styling. By creating a messenger module, you can customize the appearance and behavior according to your organizational branding and to suit your customer needs.

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Before you begin

- Install the Engagement Messenger application.
- Gather or prepare the following items:
  - Image files for your logo and messenger launcher icon. The images must be in .jpg, .png, .bmp, .gif, .jpeg, .ico, or .svg file format.
  - Color names and hex codes for branding to configure the styling of the messenger user interface.
- Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. Choose to create an Engagement Messenger module or edit an existing module.
   - To create a module, select **New**.
   - To edit an existing module, select **Edit** in the Edit module column of your messenger module.

   The guided configuration view is displayed.
3. In the guided configuration view, navigate through Module, Appearance, Behavior, Features, and Implement.
4. On the form, fill in the fields.

Engagement Messenger module form

Field	Description
Module	
Module name	Unique name for your messenger module.
Short description	Brief description of the messenger module.
Appearance	
Logo	Logo that is displayed in the header of the messenger on your website. The recommended size and dimensions are: ○ Size (in bytes): approximately equal to 2 KB ○ Height (in pixels): 30–55 ○ Width (in pixels): 30–55 **Note:** If no logo is selected, the Home icon ( ) is displayed as a default logo in the header of the messenger.
Launcher icon	Icon that is displayed as the messenger option on your website. On your website, selecting this icon launches the messenger. The recommended size and dimensions are:

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Field	Description
	○ Size (in bytes): approximately equal to 1 KB ○ Height (in pixels): 24–60 ○ Width (in pixels): 24–60 ○ Use a circular icon with a transparent background **Note:** The grid size range of a launcher icon is from 24X24 to 60X60. Any deviation from the defined range rescales automatically to fit the launcher icon size.
Launch icon position	Position of the messenger launch icon on your website.
Allow module to expand to full-height	Option for enabling the messenger module to expand to the full height of the browser tab.
Horizontal margin (in pixels)	Distance from the right or left of the browser tab for the placement of the messenger launcher icon. The distance is calculated from right or left based on your input for the field **Launch icon position**. For example, if you set the launch icon position as **Right** and the **Horizontal offset** as **50**, then the launch icon is placed at a distance of 50 px from the right of the browser tab. The maximum value for this field is 70 px.
Vertical margin (in pixels)	Distance from the bottom of the browser tab for the placement of the messenger launch icon. The maximum value for this field is 70 px.
Primary color	Primary color for styling the header or buttons in your messenger. For example, this color is used for user action buttons such as the **Submit**, **Yes**, or **OK**.
Primary font color	Text color that is used on UI elements that use the primary color.

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Field	Description
Secondary color	Secondary color for styling your messenger. For example, this color is used for user action buttons such as **Cancel** or **No**.
Secondary font color	Text color that is used on UI elements that use the secondary color.
Tertiary color	Tertiary color for styling your messenger. For example, this color is used to mark customer cases with tags such as **Action required**.
Tertiary font color	Text color that is used on UI elements that use the tertiary color.
Theme	Theme for other styling options of the messenger. This field is automatically set to **CWF Engagement Messenger Theme**. If you want to select a different theme, ensure that the theme that you select here must match certain criteria. For more information, see Engagement Messenger module theme requirements.
Note: If the value for the **Primary color**, **Secondary color**, or **Tertiary color** fields is set to color names, such as **Pink**, the Engagement Messenger UI doesn't display these colors correctly. As a workaround, you can enter the hexadecimal values of these colors. For example, use #FFC0CB for **Pink**.	
Behavior	
Notification	
Enable notifications on launcher icon	Option to enable in-app pop-up notification alert message when a new message is received.
Enable sounds	Option to get the notification alert sound.
Enable notifications in browser tab	Option to get the notification alert on the browser tab when the concerned web page isn't opened.
Enable user behavior tracking	Option for enabling the collection of Usage Insights from users of your Engagement Messenger.

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Field	Description
	This option is available only if you activate the Service Portal Analytics plugin (com.glide.service-portal.analytics) in your ServiceNow instance. **Note:** If you update your Engagement Messenger module name after user behavior tracking is enabled, the Usage Insights dashboard would show the original module name, not the updated name.
As an administrator, you can configure the Proactive Recommendations feature for Engagement Messenger. For more information, see Proactive Recommendations configuration for Engagement Messenger.	
Features	
See Feature configuration for Engagement Messenger.	
Implement	
Website URLs	Comma-separated list of URLs of the websites where you want to deploy the messenger. For example, `https://www.example.com, https://www.yourwebsiteurl.com`
Authentication type	Authentication type for this embedded messenger. Select one of the following options: ○ None ○ Security assertion markup language (SAML)-based ○ Open ID connect (OIDC)-based If you want to enable only the guest user experience for the messenger in your website, set this field to **None**. Ensure that you create an identity provider (IdP) for the authentication type you select in this field. For more information, see Create an identity provider (IdP) for Engagement Messenger.
Advanced branding	
Hyperlink text color	Text color used for hyperlinks in messenger.
Navigate-back icon	The icon appears in the messenger header that enables the user to navigate to the previous page. The icon size is 24X24.

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Field	Description
Close icon	This icon appears in the messenger header that enables the user to close messenger. The icon size is 16X16.
List search icon	The icon appears in the messenger header that enables searching through a list. The icon size is 16X16.
Expand icon	The icon appears in the header that enables the user to expand the messenger to access information. The icon size is 16X16.
Collapse icon	The icon appears in the messenger header that enables the user to collapse an expanded messenger. The icon size is 16X16.
Start-chat icon	The icon appears in the messenger header that enables the user to start a chat with an agent regarding their ticket or technician visit. The icon size is 16X16.
Filter menu icon	The icon appears at the top of the list page that enables the user to apply filters to get desired result. The icon size is 24X24.
Applied-filters icon	The icon appears at the top of the list page and shows applied filters icon in messenger. The icon size is 24X24.
Note: The advanced branding configuration is only available in the form view.	

5. Select **Save**.
6. Select **Email instructions** to notify your security administrator to complete the following tasks:
   a. Create an identity provider (IdP) for Engagement Messenger.
   b. Configure a CORS rule for Engagement Messenger.
   c. Create HTTP response headers for Engagement Messenger.

   Note: Engagement Messenger extends service portal capabilities that don't support domain separation. For more information, see Domain separation and Service Portal. However, other tables that are used in Engagement Messenger may support domain separation according to the configurations with which they're created.

Result

A new messenger configuration is created and listed in the Modules module of the Engagement Messenger application.

What to do next

1. Engagement Messenger properties.
2. configure the features of Engagement Messenger.
3. Share the messenger module code with your developer using the **Email code** to embed Engagement Messenger in your website.

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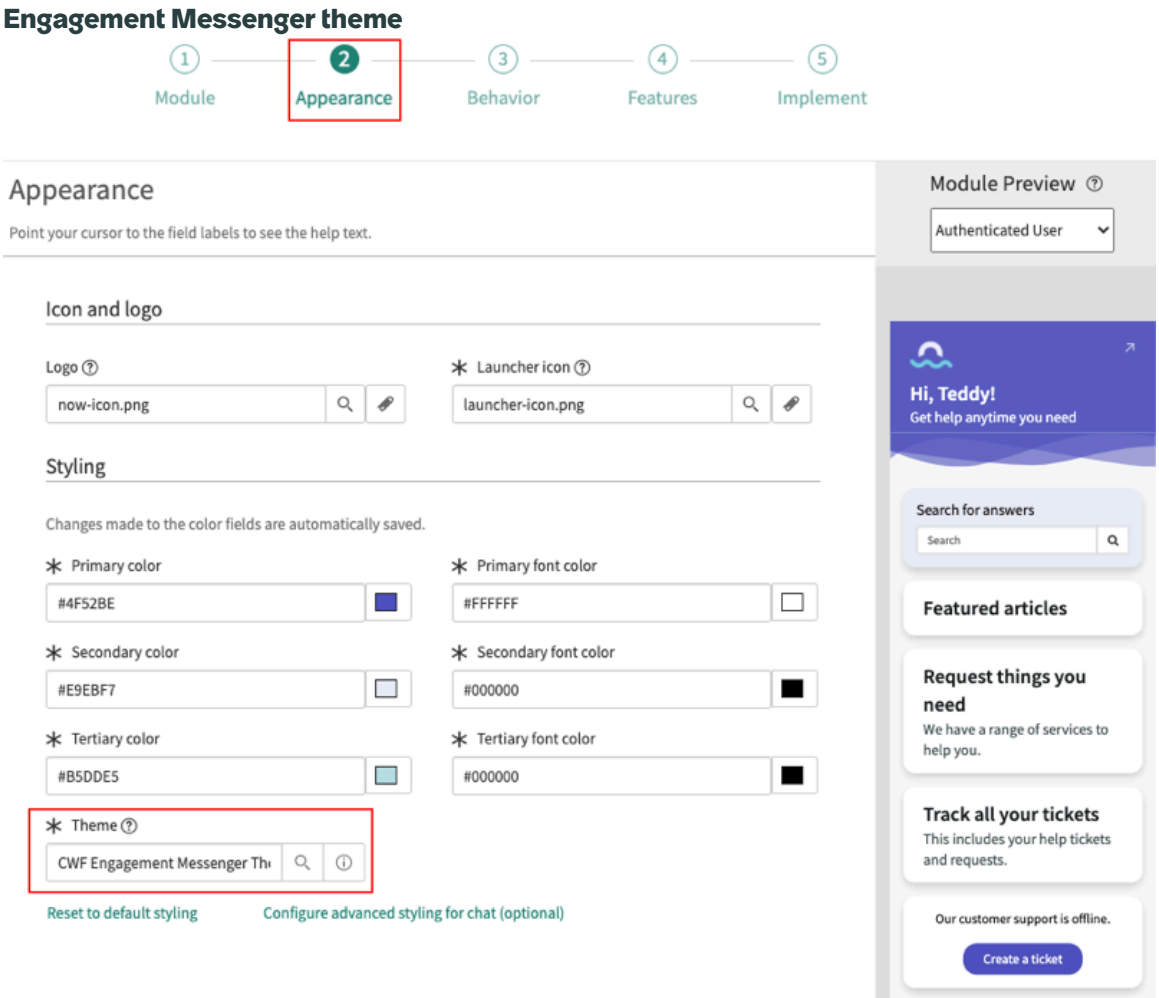
4. Following are the advanced formatting changes that are available as an optional configuration in Engagement Messenger:
   - Engagement Messenger module theme requirements to reuse Service Portal theme to customize the visual appearance in Engagement Messenger.
   - Default font sizes for search result text in Engagement Messenger.

Engagement Messenger module theme requirements

You can set a theme that you can apply to an Engagement Messenger module. A theme enables you to define additional styling of Engagement Messenger in your website.

You can select the theme for your Engagement Messenger in the Appearance section of the guided configuration.



A theme that you want to use for your messenger module must meet the following criteria:

- The header must be set as **CWF EC Header**
- It must contain the JS include `/scripts/sn_csm_ec.js`
- It must contain the CSS includes `cwf_ec_theme_inline_css` and `sp-theme-la-jolla.css`

Default font sizes for search result text in Engagement Messenger

Define normal and genius search result font sizes to change text appearance in Engagement Messenger on different devices.

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Note: The ec_admin role is required to change the default configuration.

Search types and default configurations in Engagement Messenger

Search type	Default configuration
Normal search for Knowledge Base and Catalog	The default normal search result font size settings are: • Large for title • Medium for summary **Note:** • This setting for knowledge bases is found in the *em_kb_search_template* template script. • This setting for Catalog is found in the *em_catalog_search_template* template script. The default auto-spell correction text font size is medium. **Note:** The default configuration is set in the Faceted Search widget.
Genius search for Knowledge Base and Catalog	The default genius search result font size settings are: • Small for identifier • Large for heading • Medium for summary **Note:** • This setting for knowledge bases is found in the *em_qa_genius_results_template* template script. • This setting for Catalog is found in the *em_catalog_genius_results_template* template script.

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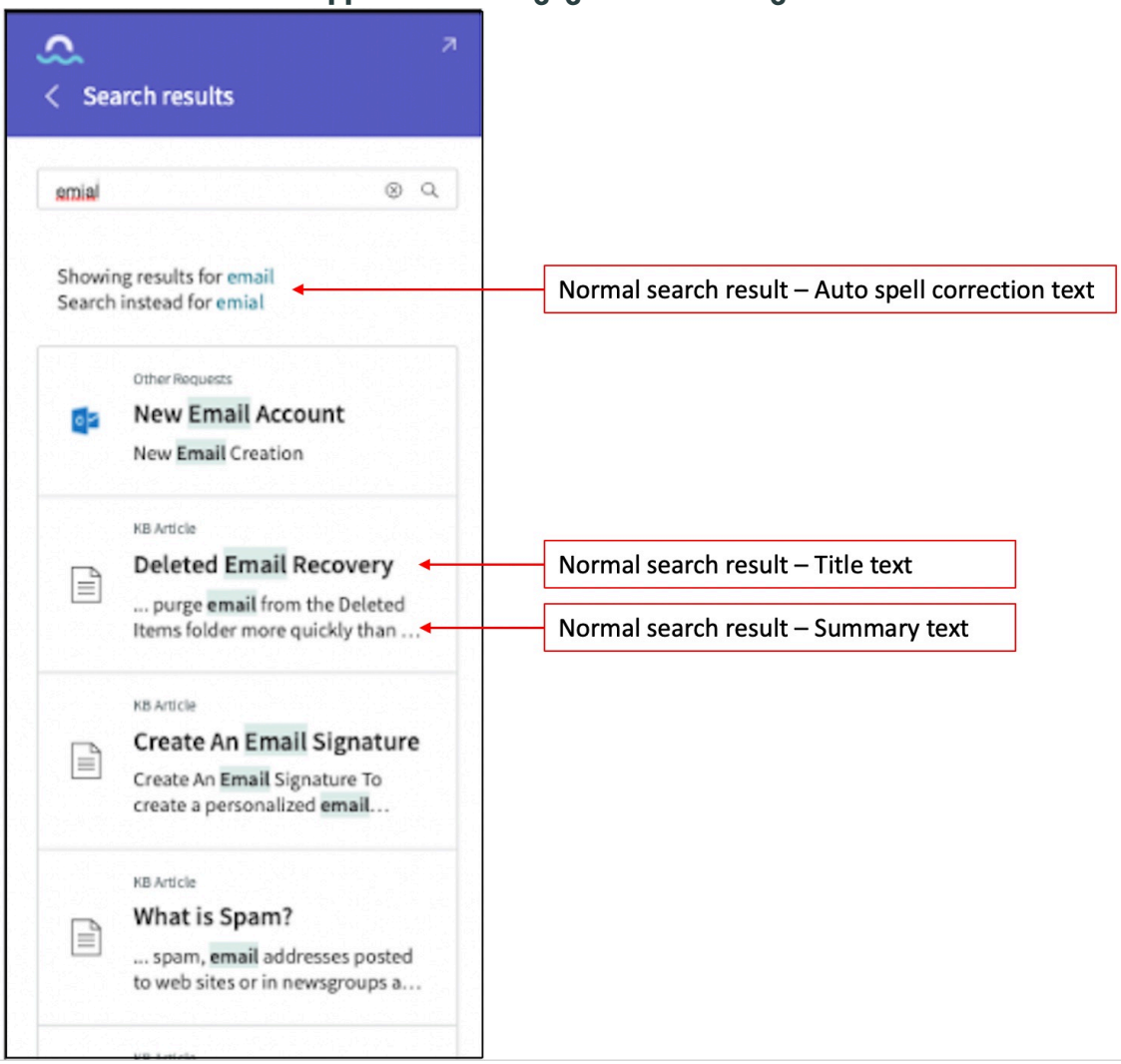
Normal search result text appearance in Engagement Messenger



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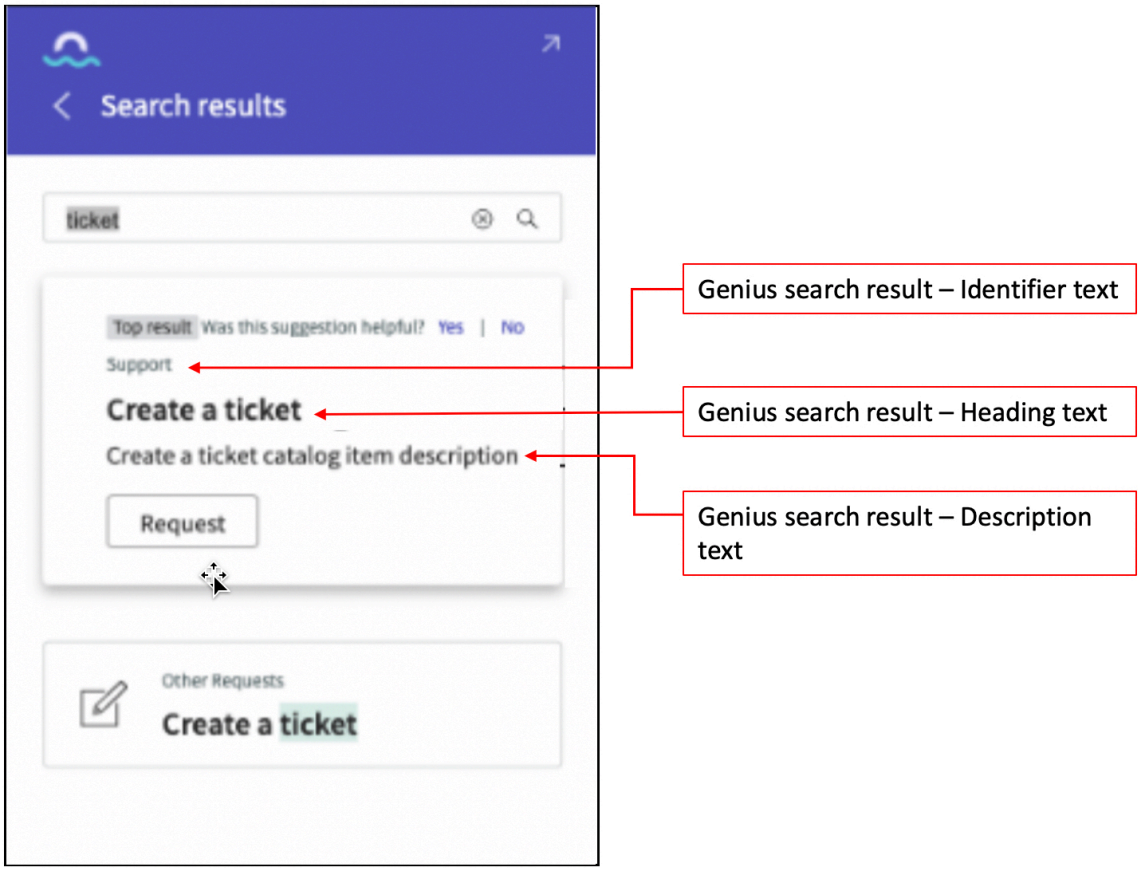
Genius search result text appearance in Engagement Messenger



Change the default chat mode for the Chat feature

Set either asynchronous chatting through a chat window or synchronous mode through messaging as the default chat mode of the Chat feature.

Before you begin

Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. On the Engagement Messenger Modules page, in the **Edit module** column, select **Edit**.
3. On the Configure Engagement Messenger Module page, select **Features**.
4. Enable the Chat feature by turning on **Chat** in the Feature settings pane.
5. On the Chat form, in the **Global chat settings** section, select **Change the default mode for chatting**.
   The Messaging Channel page opens in a new tab.
6. In the Type field, select the default chat mode.
   - To enable synchronous chat to engage in real-time conversation through a chat window, select **Chat**.
   - To enable asynchronous chat to engage in long-running conversations through messaging without being online concurrently, select **Messaging**.

     For more information, see Configure asynchronous chat for the web channel.
7. Select **Update**.

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Configure email notifications for unread chat messages

Send email summaries with all unread messages when the user isn't active during a chat conversation for a specified duration.

Before you begin

Role required: sn_csm_ec.ec_admin

About this task

You can send email summaries to an authenticated user or users who are verified by a live agent.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. On the Engagement Messenger Modules page, in the **Edit module** column, select **Edit**.
3. On the Configure Engagement Messenger Module page, select **Features**.
4. Enable the Chat feature by turning on the **Chat** in the Feature settings pane.
5. On the Chat form, in the **Global chat settings**, select **Email notifications for unread messages**.
   The Missed activity emails page opens in a new tab.
6. Enable the sending of chat email notification by turning on the **Missed activity email** option.
7. In the Offline threshold drop-down list, set the time duration that the user is inactive before sending the email notification.
   - 15 minutes (default)
   - 2 hours
   - 8 hours
   - Custom
8. Select **Save**.

Result

Automatically sends email notifications of missed chat messages at the specified time interval.

Enable Engagement Messenger on a website when third-party application cookies are blocked

Configure a custom URL for the ServiceNow instance that helps prevent web browsers from blocking Engagement Messenger when cross-origin iframes and third-party cookies are blocked.

Before you begin

You must activate the Custom URL (com.snc.customurl) plugin. For more information, see Activate custom URLs.

Role required: admin

About this task

The latest versions of browsers including Safari and Chrome have enhanced browser security features. By default, the browser security features block third-party cookies that help prevent the loading of a third-party application on a website. If you don't use a custom URL, the browser treats the messenger as a third-party application when embedded inside a parent website. To prevent messenger from getting blocked by the browser, you need to set a custom URL for the ServiceNow instance to match the messenger domain with the website domain. Using custom URL, browser treats messenger as a first-party application rather than a third-party application. The web browser's security restrictions block messenger for the following reasons:

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- Web browser blocks cross-origin iframes when the domain of the URL used in the iframe does not match the domain of the website itself.

  Note: Engagement Messenger uses an iframe to load messenger's#nterface on a third–party website.

- Web browser treats messenger's cookies as the third-party cookies and blocks them.

  Note: Engagement Messenger uses cookies to enable features like authentication, recommendations, proactive help and so on.

Note: Custom URL is primarily configured to get a branded URL for the ServiceNow instance, Portals, and EM module that matches with your domain URL.

You must add a CNAME record to your website domain's DNS records where Engagement Messenger is embedded and set it as your ServiceNow instance URL. For example, in the name server for `acme.com`, create an entry

```
support.acme.com 300 IN CNAME acme.servicenow.com
```

where `acme.service-now.com` is the ServiceNow instance and `acme.com` is your website on which Engagement Messenger is integrated.

Procedure

1. Navigate to **All** > **Custom URL** > **Custom URLs**.
2. Select **New**.
3. On the Custom URL form, in the **Domain name** field, enter the CNAME record (your custom URL) that you have set as the ServiceNow instance URL.
4. Select **Create**.

   Note: The new custom URL takes approximately six hours for activation.

5. **Optional:** After the custom URL is active, on the Custom URL form, select the **Set instance URL** check box to enable the custom URL as an instance URL.
6. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
7. In the code, replace the existing website URL with a custom URL.
8. Save the file.

Result

Engagement Messenger loads on a third-party website.

Example:

The following code includes a sample URL that contains `support.acme.com` as a custom URL.

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Custom URL in code

```
<script src='https://support.acme.com/scripts/sn_csm_ec.js?v=4.0.1'></script>
<script>
SN_CSM_EC.init({
    moduleID: 'https://support.acme.com'#<module_id>,
    loadFeature: chatFeatureContext()
});
</script>
```

Related topics

Set a custom URL as the instance URL

Custom URLs association to your instance

Custom URL errors and fixes

Update Engagement Messenger launch URLs to the latest version

Update the version of Engagement Messenger in the code used to embed Engagement Messenger in your website or to launch features automatically with Engagement Messenger.

Before you begin

Role required: Website administrator

Procedure

1. Open the HTML file of the web page on the website where you integrate Engagement Messenger.
2. Change the existing version number to `v=3.1`.
   For example:

```
<script src="https://example.service-now.com/scripts/sn_csm_ec.js?v=3.1"></script>
<script>
SN_CSM_EC.init({
       moduleID: "https://example.service-now.com/#aeff0547dd393010f87734cef087e2ba",
       loadFeature: SN_CSM_EC.loadEMFeature()
});
</script>
```

3. Save the file.

Engagement Messenger properties

You can configure the system properties for your Engagement Messenger module so that you can enable Virtual Agent chat, multi-provider SSO, and set a user session time-out value.

Properties installed with Engagement Messenger

After you configure an Engagement Messenger module, set the following system properties that are based on your configuration of the messenger module.

Tip: In the navigation filter, enter `sys_properties.list` to view the list of all the system properties and search for the property that you want to update.

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Properties and descriptions of the Engagement Messenger module

Property	Description
com.glide.cs.embed.csp_frame_ancestors	After activating the Glide Virtual Agent plugin (com.glide.cs.chatbot), you must use the *com.glide.cs.embed.csp_frame_an* system property to enable the configuration o frame-ancestors policy for the website where to host Engagement Messenger. Set the value of the *com.glide.cs.embed.csp_frame_an* system property 'self' `<your website URI` example, 'self' `https://www.example.c` • Type: string • Value: self • Location: System Properties
glide.authenticate.multisso.enabled	Set the *glide.authenticate.multisso.ena* system property to true to enable multiple pro SSO. • Type: true | false • Value: self • Location: System Properties **Note:** If you want to enable only a guest experience for your customer service por can ignore this configuration.
User session time-out *glide.ui.session_timeout*	Set a user session timeout value for the *glide.ui.session_timeout* system pr to a value that is greater than or equal to your time-out. • Type: integer • Value: 30 • Location: System Properties **Note:** If you want to enable only a guest experience for your customer service por can ignore this configuration.
sn_customerservice.emails.customportal	Set the URL of your third-party customer supp so that the notification emails that your custor contain URLs that redirect them to the exact re record that they submitted.

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Properties and descriptions of the Engagement Messenger module (continued)

Property	Description
	These notification emails are sent in scenario submitting a case, requesting a service, reque field technician, or booking a walk-up appoint • Type: string • Value: None • Location: System Properties For example, if your customer support portal i `https://www.example.com/support` then set the property value to `https://www.example.com/support`.
`sn_csm_ec.proactive_inactivity_time`	Set the inactive period (in seconds) to trigger help in Engagement Messenger. • Type: integer • Value: 2 • Location: System Properties
`glide.knowman.serviceportal.use_numbered_url`	The property contains a comma-separated lis service portal record sys_ids. For any portal re specified in this property, the article link will b displayed with the sysparm_number URL para instead of sys_kb_id. • Type: string • Value: None • Location: System Properties

Feature configuration for Engagement Messenger

Configure the features of Engagement Messenger so that you can change the default settings to suit your customer needs.

Before you begin

Role required: sn_csm_ec.ec_admin

You must configure Engagement Messenger before configuring its features. For more information, see Configure Engagement Messenger.

About this task

Configure how the features of Engagement Messenger appear to your customers, their display arrangement, and their behavior.

Use the Features section of the guided configuration to customize the messenger configuration. View a live preview of how the Engagement Messenger would look like in your third-party website. You can also watch the academy video to understand the overall functionality of Engagement Messenger.

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Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. In the Edit module column of the messenger module that you want to configure, select **Edit**.
   The guided configuration view is displayed.
3. From the Features section of the guided configuration, enable or disable a feature by using the toggle ( ) on the feature card.
4. Open one of the following features and modify the values:
   - Greeting: See Greeting feature configuration.
   - Knowledge: See Knowledge feature configuration.
   - Search: See Search feature configuration.
   - Case: See Case management feature configuration.
   - Catalog: See Catalog feature configuration.
   - Field service: See Field service feature configuration.
   - Walk-up: See Walk-up feature configuration.
   - Chat with an agent: See Chat feature configuration form fields.

     Note:

     - The knowledge article, catalog item, and case links sent by an agent can be opened within Engagement Messenger. You can configure how links should be open in a messenger. For more information, see Create a smart link preference.
     - You can also enable the Now Assist in Virtual Agent in Engagement Messenger by Assistants overview and then Display your assistant in Engagement Messenger.

   - Configurable Cards: See Configurable Cards feature configuration.
   - Callback: See Callback feature configuration form.
5. **Optional:** You can also add a feature in the **Features** section using Configurable Cards.
   a. Select **Add custom feature**.
   b. Enter the feature name and select the feature type.
   c. Select **Add**.
   For more information, see Configurable Cards feature configuration.
6. Select **Update**.
7. **Optional:** Change the display order of the features by reordering the feature cards.
   You can see the modified home page layout of your Engagement Messenger in the live preview of the module.

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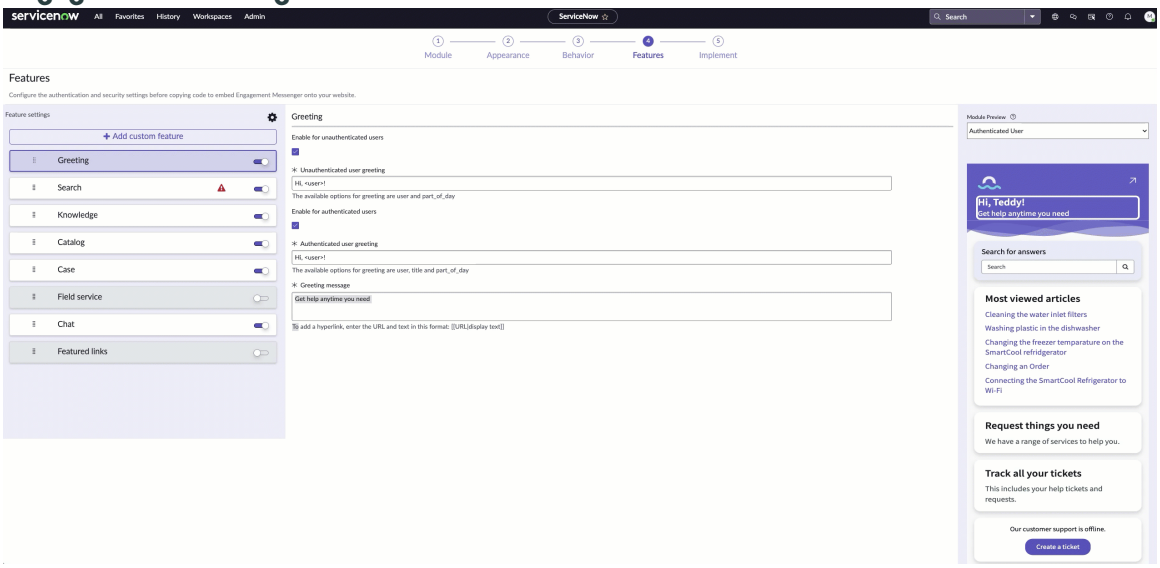
Engagement Messenger features



Note: Engagement Messenger extends service portal capabilities that don't support domain separation. For more information, see (Domain separation and Service Portal). However, other tables that are used in Engagement Messenger may support domain separation according to the configurations with which they're created.

What to do next

Create an identity provider (IdP) for Engagement Messenger

Enable AI Search in Engagement Messenger for unauthenticated users

Enable the AI Search experience in Engagement Messenger so unauthenticated users can see the most relevant set of search results.

Before you begin

You must configure AI Search for the Engagement Messenger before enabling AI Search for an unauthenticated user. For more information, see Search feature configuration.

Role required: admin

About this task

As an admin, you must enable the EC AI Homepage Search, Typeahead Search, and AI Search Assist widgets in Engagement Messenger to enable the AI Search capability for unauthenticated users.

Procedure

1. Navigate to **Service Portal** > **Widgets**.
2. Search for and open the **EC AI Homepage Search** widget.
3. Select the **Public** check box.
4. Select **Update**.

What to do next

Enable the Typeahead Search and AI Search Assist widgets. For information, see Enable AI search in the Customer and Consumer Service Portals for unauthenticated users.

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Configure the default behavior of Engagement Messenger

Configure the default behavior of Engagement Messenger to set the default settings for Notification, Recommendations, and Proactive.

Before you begin

Configure Engagement Messenger.

Use Engagement Messenger embed Code to integrate proactive recommendations on a web page.

Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. Select the Engagement Messenger module you want to install on your website.
3. In the Edit module column, select **Edit**.
4. In the Configure Engagement Messenger module, select the **Behavior** tab.
5. In the **Behavior** tab, configure the **Recommendations** and **Proactive** settings to define the Engagement Messenger functions.
   For more information, see Proactive Recommendations configuration for Engagement Messenger.

   Note: For information about how to customize the Notification behavior, see Configure Engagement Messenger.

6. Select **Save**.

Proactive Recommendations configuration for Engagement Messenger

The Proactive Recommendations feature enables you to show context-based suggestions in real time and to configure the recommendations experience on Engagement Messenger.

Note: To integrate Proactive Recommendations on a web page, you need to enable recommendations in the embed code of Engagement Messenger.

Recommendations setting configuration form

Field	Description
Enable recommendation	Option to show or hide the recommendations.
Title text	Title of the recommendation screen in the messenger.
Subtitle text	Helpful text about the recommendations that displays at the top of the recommendations screen.
Show the search bar	Option to display the search bar on the Recommendation page that enables you to search content in addition to the provided recommendations.
Maximum number of recommendations	The maximum number of recommendations to be shown on the recommendations screen.

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Recommendations setting configuration form (continued)

Field	Description
Link text for additional recommendations	Text for the link that enables the user to view an additional recommendations.
Link text for Engagement Messenger	Text displayed in the footer of the messenger to enable navigation to the Engagement Messenger home page. Use the `[[display text]]` format to add a clickable link to messenger.
• If AI Search does not return any recommendations, then the Engagement Messenger home page is displayed. • You need to enable AI Search to make Recommendations available to users.	

Proactive setting configuration form

Field	Description
Type	Type of display to show the suggestions proactively on messenger after 30 seconds of inactivity. Select **None** to disable proactive behavior.
Choose an animation type	The type of animation for the launcher icon that activates when the user is inactive. • Ripple (like a wave) • Bounce
Show a tooltip above the icon	Option to show the tooltip message above the launcher icon.
Tooltip text	The message displayed on the tooltip.
Offer search	
Title text	Title of the widget that appears when **Offer search** is selected as the proactive help type.
Subtitle text	Description of the widget that appears on the widget body and appears below the title text.
Placeholder text	Placeholder text that appears in the search box.
Offer chat	
Title text	Title of the widget in the messenger.
Subtitle text	Description of the widget in the messenger.
Chat button label	Label of the button that is displayed for the user to start the conversation.
Offer the recommendation you configured	

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Proactive setting configuration form (continued)

Field	Description
Select the **Offer the recommendation you configured** option to show the knowledge article and catalog items recommendations proactively as per the configuration in the Recommendations section.	
Note: AI Search needs to be enabled for Offer search and Offer the recommendation you configured options.	

Use Engagement Messenger embed Code to integrate proactive recommendations on a web page

Modify the embed code of Engagement Messenger to enable recommendations and pass the search query for recommendations based on AI Search.

Before you begin

- Embed Engagement Messenger in your web application.
- Activate an Engagement Messenger module.
- Role required: sn_csm_ec.ec_admin

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. Select the Engagement Messenger module you want to install on your website.
3. In the Edit module column, click **Edit**.
4. In the Configure Engagement Messenger module, select the **Implement** tab.
5. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
6. In the **Implement** tab, copy the code from the Embed code section.
7. Paste the code you copied into the text file before the closing body tag.
8. Enable recommendations for a specific page in messenger by adding the parameter `enableRecommendations: true` in the embed code.

   In the website where you integrate Engagement Messenger, when the user enters a search term in messenger, by default the website URL slug (last part of the URL) will be considered the search query. The URL slug conditions for the search query entered in the messenger search bar are as follows:

   - If a single forward slash is at the end of the URL, then no search term is picked. For example, `https://example.service-now.com/`.
   - If a term is surrounded by forward slashes at the end of the URL, the enclosed text is considered to be a search term. For example, in the URL `https://example.service-now.com/product-xyz/`, product xyz is considered a search term.
   - If a single forward slash is followed by text, that text is considered to be a search term. For example, in the URL `https://example.service-now.com/search_string` search string is considered as a search term.

   The URL slug is used to deduce the search query as follows:

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- All the special characters are replaced by a space. For example, in the URL `https://example.service-now.com/product-xyz`, the search term is "product xyz".
- Any file extension is ignored. For example, in the URL `https://example.service-now/product.html`, the search term is "product".

9. Enable recommendations at the module level.
   a. Navigate to **All** > **Engagement Messenger** > **Modules**.
   b. Select your Engagement Messenger module.
   c. Click **Edit**.
   d. In the Configure Engagement Messenger module, select the **Behavior** tab.
   e. Enable the **Enable recommendations** toggle switch.
10. **Optional:** Add custom logic for passing a search query parameter to the AI Search by passing a function callback as the value for a parameter `getAISRecommendationsContext`. The following example shows the modified code to generate proactive recommendations with the custom logic for passing a search context query.

```
‹script
 src="https://
example.service-now.com/scripts/sn_csm_ec.js"></script>
  ‹script>
  SN_CSM_EC.init({

 moduleID:"https://instancename.service-now.com/<sys_id>",
              loadFeature: SN CSM EC. loadEMFeature(),
              enableRecommendations: true,
              getAISRecommendationsContext: function
 getSearchQuery(){
              //Insert your code here to fetch the search
 query string return product xyz
}

  };
  </script>
```

11. Save and publish the HTML file.

Result

Engagement Messenger shows recommendations based on the context provided by the third-party website.

Example:

The following example shows the modified code to generate default proactive recommendations for the default context.

```
‹script
 src="https://
example.service-now.com/scripts/sn_csm_ec.js"></script>
  ‹script>
  SN_CSM_EC.init({

 moduleID:"https://instancename.service-now.com/<sys_id>",
              loadFeature: SN CSM EC. loadEMFeature(),
              enableRecommendations: true
             }
```

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```
};
</script>
```

Create an identity provider (IdP) for Engagement Messenger

Create an IdP for your Engagement Messenger so that you can enable customer authentication. You can create an IdP for either the OpenID Connect (OIDC) or Security Assertion Markup Language (SAML) authentication type.

Before you begin

Role required: admin

About this task

If you previously configured an IdP, you can ignore this task and reuse the existing IdP.

Note: If you have configured multiple IdPs on your instance and want to select a specific IdP for your Engagement Messenger module, do the following:

- Enable Engagement Messenger on a website when third-party application cookies are blocked
- Custom URL with Identity Provider
- If you have multiple IdPs on your instance:
  - In case of OIDC authentication type, the generated ID token should contain the client ID of a IdP record against which authentication is required.
  - In case of SAML authentication type, set the particular IDP record as Auto-redirect IdP.

  Note: For more information, see Setting up auto login and logout for Engagement Messenger.

Procedure

1. Navigate to **All** > **Multi-Provider SSO** > **Identity Providers**.
2. Select **New**.
3. Select either **OpenID Connect** or **SAML**.
   - If you select **OpenID Connect**, follow the procedure in Create an OpenID Connect (OIDC) configuration for Single Sign-On (SSO).
   - If you select **SAML**, follow the procedure from step 3 in Create and update identity providers.

What to do next

- When customers sign in to your website where the Engagement Messenger module is deployed, they must also be authenticated within the messenger. User authentication is done by using the same IdP that authenticated the customer's login into your website.

  You must verify that the customers of your website are also added in your OIDC or SAML authentication provider for the ServiceNow instance.

- Enable cross-domain requests between Engagement Messenger and your website. For more information, see Configure a CORS rule for Engagement Messenger.

Related topics

How to set up OIDC provider on ServiceNow instance

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Configure a CORS rule for Engagement Messenger

Configure a cross-origin resource sharing (CORS) rule to enable cross-domain requests between Engagement Messenger and your website where you want to deploy the messenger.

Before you begin

Role required: admin

You must complete the following tasks:

- Configure Engagement Messenger.
- Create an identity provider (IdP) for Engagement Messenger.

About this task

Use the Engagement Messenger API and your website URL to create a CORS rule.

Procedure

1. Navigate to **All** > **System Web Services** > **REST** > **CORS Rules**.
2. Select **New**.
3. On the form, fill in the fields.

CORS Rule form

Field	Description
Name	Unique name for the CORS rule.
Application	Application scope for this record.
REST API	Engagement Messenger REST API that this CORS rule applies to. Set this field to **Engagement Center API [sn_csm_ec/engagement_center_api]**.
Domain	Domain that sends the request to this REST API. Set this field value to the URL of the website where you want to deploy the messenger. For example, **https://www.example.com**.
Max age	Number of seconds to cache the client session. After an initial CORS request, further requests from the same client within this time do not require a preflight message. If you do not specify a value, the default value of 0 indicates that all requests require a preflight message.
HTTP Methods	Allowed HTTP methods. Enable the GET and POST methods.

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Field	Description
HTTP Headers	Comma-separated list of HTTP headers to send in the response. You can leave this field empty.

4. Select **Submit**.

What to do next

Create HTTP response headers for Engagement Messenger.

Create HTTP response headers for Engagement Messenger

Configure a name-value pair for HTTP response headers for the Engagement Messenger module. The ability to configure and pass response headers enables special handling of the page content by a client, which is most typically a browser.

Before you begin

- Configure Engagement Messenger.
- Create an identity provider (IdP) for Engagement Messenger.
- Configure a CORS rule for Engagement Messenger.
- Role required: admin

About this task

Use the Engagement Messenger API and your website URL to create a CORS rule.

Procedure

1. In the navigation pane, enter `sys_response_header.list`.
2. Select **New**.
3. On the form, fill in the fields.

HTTP Response Header form

Field	Description
Active	Option for indicating that this HTTP response header configuration is active.
Application	Application scope for this record.
Applies to	Type of record that the HTTP response header configuration applies to. Select **Specific Type** to indicate that this HTTP response header configuration is for the specific type and record that you select in the **Type** and **Record** fields.
Type	Type of record that the HTTP response header configuration applies to.

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Field	Description
	Select **Service Portal** to indicate that the records are related to the Service Portal.
Record	Engagement Messenger module record that the HTTP response header configuration applies to. Select a record: **a.** Select the Search ( ) icon to access the Select the document pop-up form. **b.** In the **Table name** field, ensure that the value is set to **Service Portal**. **c.** In the **Document** field, select the Search ( ) icon. **d.** From the list of Service Portal records, select the messenger module that you configured. **e.** Select **OK**.
Name	Name for the name-value pair for the HTTP response header. Set this field value to **Content-Security-Policy**.
Value	Value for the name-value pair for the HTTP response header. Set this field value to **frame-ancestors 'self' <enter your website URL>**. For example, **frame-ancestors 'self' https://www.example.com**.
Description	Detailed description for the HTTP response header.

What to do next

Activate an Engagement Messenger module

.

Related topics

HTTP Response Headers

Activate an Engagement Messenger module

Activate the Engagement Messenger module that you configured so that you can embed it in your website.

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Before you begin

Role required: sn_csm_ec.ec_admin

Perform the following tasks:

- Configure Engagement Messenger.
- Create an identity provider (IdP) for Engagement Messenger.
- Configure a CORS rule for Engagement Messenger.
- Create HTTP response headers for Engagement Messenger.

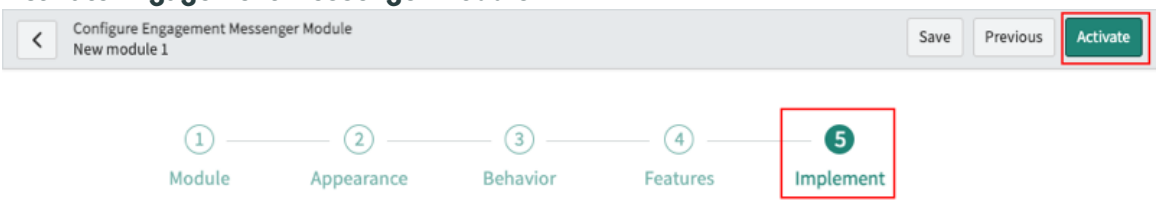
About this task

Unless you activate a messenger module, it would not be available for your customers to use from within your third-party website.

Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. In the Edit module column of the messenger module that you want to activate, click **Edit**.
   The guided configuration view is displayed.
3. Select the **Implement** step.
4. Select **Activate**.

Activate Engagement Messenger module



What to do next

Embed Engagement Messenger in your web application.

Embed Engagement Messenger in your web application

Embed the source code of the messenger module that you configured in your website so that you can enable your customers to start using Engagement Messenger in your website.

Before you begin

- Activate an Engagement Messenger module.
- Role required: sn_csm_ec.ec_admin

About this task

Copy the source code of the messenger module that you activated and paste it in the HTML file of the website where you want to deploy the messenger.

Next, depending on the authentication type that you selected for your configured messenger module, you may have to write code for functions to get the ID token and to start and stop the session for a logged-in user in the messenger.

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Procedure

1. Navigate to **All** > **Engagement Messenger** > **Modules**.
2. In the Edit module column of the messenger module that you want to install in your website, click **Edit**.
   The guided configuration view is displayed.
3. Click the **Implement** tab.
4. If you have done any changes to the Security settings section, click **Save**.
   The code of the Engagement Messenger module is updated.
5. Scroll down to the Embed code section and click **Copy code**.
6. Open the HTML file of your website and paste the copied code before the closing body tag.
7. For a messenger module with OIDC-based or SAMI-based authentication, complete the following configuration.

Authentication type	Action
OIDC-based	**a.** Write code for the `getTokenCallBack()` function. **b.** Call the `SN_CSM_EC.onLogin()` function whenever users log in to your website. This function enables authenticated users to log in to Engagement Messenger seamlessly when they log in to your website. **c.** Call the `SN_CSM_EC.onLogout()` function whenever users log out from your website. This function enables authenticated users to seamlessly log out from Engagement Messenger and your website.
SAML-based	**a.** Call the `SN_CSM_EC.onLogin()` function whenever users log in to your website. This function enables authenticated users to log in to Engagement Messenger seamlessly when they log in to your website. **b.** Call the `SN_CSM_EC.onLogout()` function whenever users log out from your website. This function enables authenticated users to seamlessly log out from Engagement Messenger and your website.

Note: For more information about setup for OIDC and SAML-based authentication, see Setting up auto login and logout for Engagement Messenger [KB1560205] article in the Now Support Knowledge Base.

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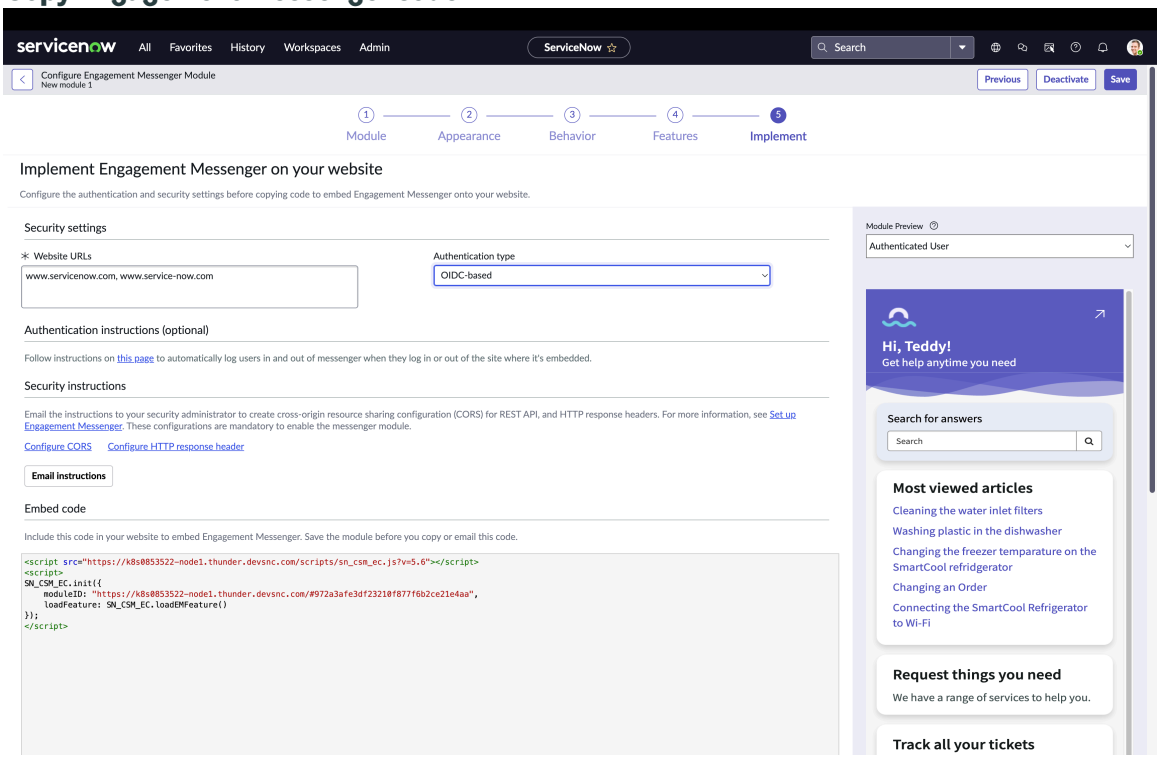
8. If you enabled the walk-up feature for unauthenticated users, uncomment the `//guestWalkupBaseUrl` code line and complete the configuration by entering the base URL of your customer support portal.

   For example, if your customer support portal is **https://www.example.com/support**, then update the code to **guestWalkupBaseUrl = https://www.example.com/support**

   Copy Engagement Messenger code

9. **Optional:** To modify the embed code to set the preferred language in which Engagement Messenger is displayed, do one of the following.

Option	Description
`lang: {ISO-locale code}`	Enables you to load Engagement Messenger with a fixed language.
`setLang : getEMLanguage`	Allows you to dynamically switch the lan guage in which Engagement Messenger is dis played. The `getEMLanguage` value can re turn any ISO-locale code which can be used for messenger language.

   The `setLang : getEMLanguage` function takes preference when both parameters are available. However, if the user has set the preferred language in the [sys_user_preference] table, Engagement Messenger will be displayed in that language.

   Note: Beginning with the Brazil release, the upgraded customers can also modify the embed code to enable language switching.

10. **Optional:** Open the website to which you added the Engagement Messenger code to verify that the launcher icon is available and click the icon to verify that it launches Engagement Messenger.

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11. **Optional:** Modify the embed code of Engagement Messenger to integrate Proactive Recommendations on a web page.
    For more information on using Engagement Messenger to integrate Proactive Recommendations on a web page, see Use Engagement Messenger embed Code to integrate proactive recommendations on a web page.

What to do next

Open the website that you added the Engagement Messenger code to and verify that the launcher icon of the messenger is available. Click the icon to launch the Engagement Messenger.

You can also embed Engagement Messenger in your native iOS and android applications using Now Mobile SDK:

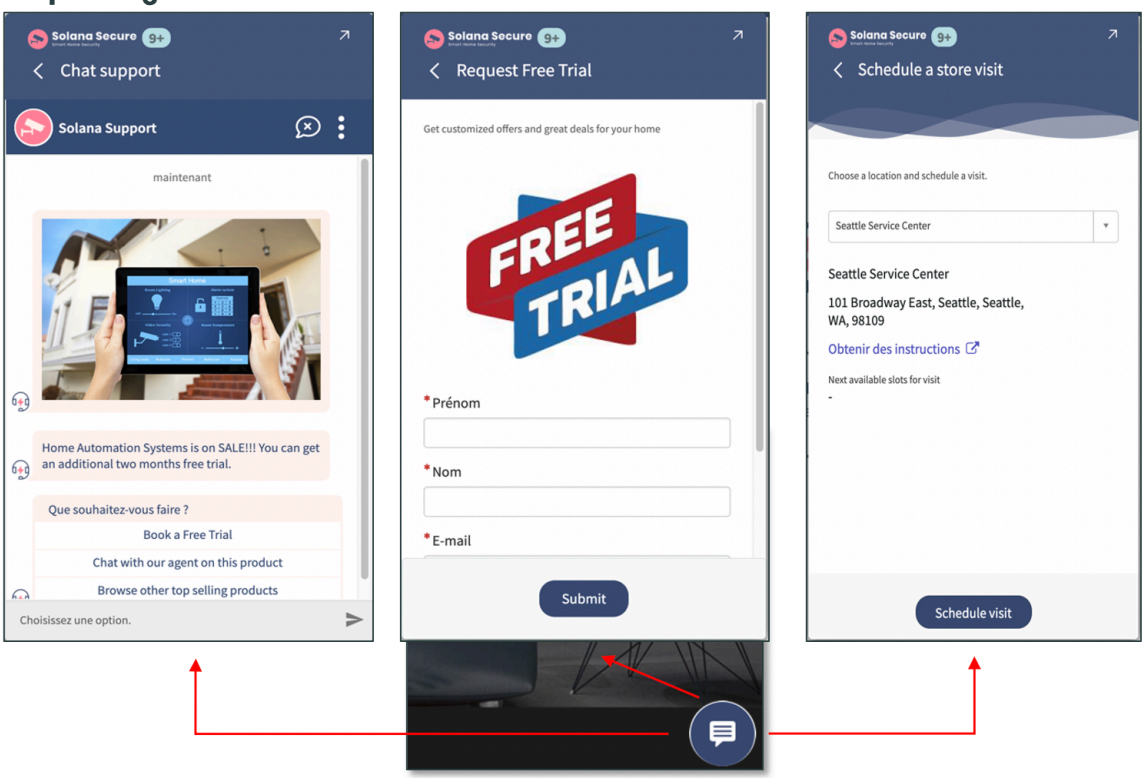
- Embed Engagement Messenger in a native iOS app using Now Mobile SDK [KB1587276]
- Embed Engagement Messenger in a native android app using Now Mobile SDK [KB1587611]

Deep linking feature in Engagement Messenger

Set a workflow as a default launch screen in Engagement Messenger either using custom code or a parameterized URL.

The deep linking capability enables you to customize the home page of Engagement Messenger so that you can launch a specified feature every time the messenger is accessed. The feature is launched through variables in a structured URL or in custom code through launch entries that contain substitution variables.

Deep linking launch screens



The deep linking capability supports the launch of View Article, New Case, Case List, Search, Case Search, Catalog Item, New Appointment, New Work Order, Default Home, Work Order, Virtual Agent and Live Agent chat features and display in Engagement Messenger.

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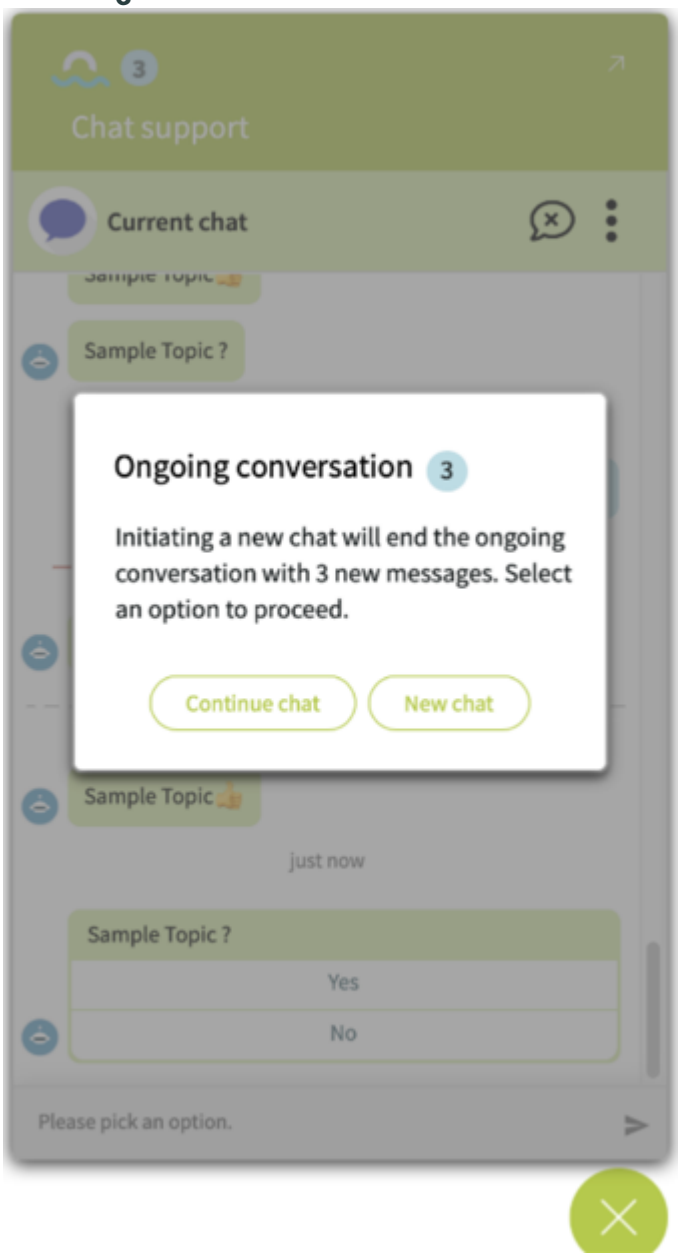
Note: Beginning with the Brazil release, in Virtual Agent and Live Agent chats, if a user is engaged in an ongoing conversation and tries to contextually open a topic then the following options are shown:

- Continue chat
- New Chat

Switching chat



Launch a feature in Engagement Messenger using custom code

Use the custom code to enable the deep linking and launch a feature in Engagement Messenger integrated with your website.

Before you begin

Configure Engagement Messenger.

Embed Engagement Messenger in your web application.

Role required: ec_admin and website administrator

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About this task

Note:

If you're using existing code, verify that you update the script to show `v=3.1`. For example:

```
<script
 src="https://
example.service-now.com/scripts/sn_csm_ec.js?v=3.1"></scri
pt>
<script>
SN_CSM_EC.init({
      moduleID:
 "https://example.service-now.com/#aeff0547dd393010f87734cef
087e2ba",
      loadFeature: SN_CSM_EC.loadEMFeature()
});
</script>
```

Procedure

1. Navigate to **Engagement Messenger** > **Modules**.
2. In the Configure Engagement Messenger Module, open the Implement tab.
3. Copy the code from the Embed code section.
4. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
5. Paste the code that you copied before the closing body tag.
6. Define the feature context and specify the variables for the feature.
   Use the following format to define a feature context:

```
{
 feature: "<feature_name>",
 openOnLoad: <true/false>,
 params: {
  "<param_name>": "<param_value>",
  "<param_name>": "<param_value>
 }
}
```

   In the format, specify the feature variables.

   feature

   The feature name. For more information, see Feature context parameters supported in Engagement Messenger .

   openOnLoad

   Include this option and set it to true only if you want Engagement Messenger to open automatically. The default setting for this option is for Engagement Messenger not to open automatically.

   <param_name>": "<param_value>

   Name and value of a parameter associated with the feature. For more information, see Feature context parameters supported in Engagement Messenger.

7. Create a custom wrapper function to pass the feature context to the `SN_CSM_EC.init` function of the embed code.

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For example, the following code uses the `chatFeatureContext()` custom wrapper function for the chat feature context.

```
function chatFeatureContext(){
 return {
   feature: "CHAT",
   openOnLoad: false,
   params: {
    "topic_id": "8708db281bd5b81080df6247b04bcb79",
    "language": "fr"
    }
    }
}
```

8. Replace the `SN_CSM_EC.loadEMFeature()` function with a custom wrapper function that you created in step 7.
   For example, in the following code, the `chatFeatureContext()` wrapper function is passed as the value of the `loadFeature` attribute.

```
SN_CSM_EC.init({
  moduleID: "https://example.service-now.com/#<module_id>",
  loadFeature: chatFeatureContext()
});
```

9. Save the file.
10. **Optional:** Verify that the designated feature launches.
    a. Open the website in which you embedded Engagement Messenger.
    b. Select the launcher icon.
    c. Verify that Engagement Messenger launches feature you configured in the embed code.

Result

The feature you specified in the embed code is launched by default when Engagement Messenger is opened in the website in which it's embedded.

Example:

The following code initiates the chat feature by default. It also shows how to trigger a Virtual Agent topic by default when chat is loaded by passing the system identifier (sys_id) of the topic. You can also specify a language to initiate chat in that language.

```
<script
 src="https://
example.servicenow.com/scripts/sn_csm_ec.js?v=3.1"></script>
<script>
function chatFeatureContext(){
 return {
   feature: "CHAT",
   openOnLoad: false,
   params: {
    "topic_id": "8708db281bd5b81080df6247b04bcb79",
    "language": "fr"
    }
    }
}

SN_CSM_EC.init({
```

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```
 moduleID:
 "https://example.service-now.com/#d27c94d6db403810a2a6a0ced3961
9da",
 loadFeature: chatFeatureContext()
});
</script>
```

function

chatFeatureContext(): The wrapper function for chat context.

feature

CHAT: The chat feature for initiating Virtual Agent or Live Agent chat.

openOnLoad

false: Disable the automatic launch of Engagement Messenger.

topic_id

8708db281bd5b81080df6247b04bcb79: The module system identifier (sys_id).

language

fr: Sets the default chat language to French.

Launch a feature in Engagement Messenger using URL parameters

Use URL parameters in your website's URL to enable the deep linking and launch a feature in Engagement Messenger integrated with your website.

Before you begin

Configure Engagement Messenger.

Embed Engagement Messenger in your web application.

Role required: ec_admin and website administrator

About this task

You can use URL parameters to display specific feature in Engagement Messenger. When the URL is accessed, it opens your website and automatically loads the specified feature in Engagement Messenger. For example, you can embed the URL in an email to share a knowledge article from Engagement Messenger.

Note:

If you are using existing Embed code, ensure that you update the script to include `v=3.1`. For example:

```
<script src="https://example.service-now.com/scripts/sn_csm_ec.js?v=3.1"></script>
<script>
SN_CSM_EC.init({
        moduleID: "https://example.service-now.com/#aeff0547dd393010f87734cef087e2ba",
        loadFeature: SN_CSM_EC.loadEMFeature()
});
</script>
```

Procedure

1. Navigate to **Engagement Messenger** > **Modules**.
2. In the Configure Engagement Messenger Module, open the Implement tab.

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3. Copy the code from the Embed code section.
4. In a text editor, open the HTML file of the web page on your website where you integrate Engagement Messenger.
5. Paste the code you copied before the closing body tag.
6. Save the file.
7. Modify the website URL to include the feature.

```
https://website/page.html?feature=<FEATURE_NAME>&<PARAM_NAME1>=
<PARAM_VALUE1>&<PARAM_NAME2>=<PARAM_VALUE2>
```

<FEATURE_NAME>

The feature name. For information, see Feature context parameters supported in Engagement Messenger.

<param_name1>=<param_value1>

Name and value of a parameter associated with the feature. To define multiple parameters, use the same format. For more information, see Feature context parameters supported in Engagement Messenger.

8. **Optional:** Verify that the URL launches the designated feature automatically.

Result
The feature you included in the URL is set as the default launch screen in Engagement Messenger.

Example:
The following sample URL includes a system identifier (sys_id) for a knowledge article that will automatically display when the website is launched.

```
https://mywebsite/page.html?feature=VIEW_ARTICLE
 &sys_kb_id=ec7617461b01f01080df6247b04bcbaf
```

Chat Zoom Connector

Resolve issues quickly and engage better with customers with video and screen sharing options in Zoom using the ServiceNow® Chat Zoom Connector application.

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.

Overview

The Chat Zoom Connector application integrates the chat communication channel with the Notify communication channel by managing and initiating a Zoom meeting directly from a chat. An interaction record is created for each Zoom meeting initiated from a chat.

As an agent, you can use the Chat Zoom Connector application to initiate Zoom meetings from a customer chat and optionally record the meeting.

As an agent manager, you can access an interaction record of type Zoom to view the meeting details such as the meeting URL, participants, and recording.

As a customer, you can join a Zoom meeting with an agent regardless of whether you have a Zoom account.

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To get started with the Chat Zoom Connector application, see Configure Chat Zoom Connector.

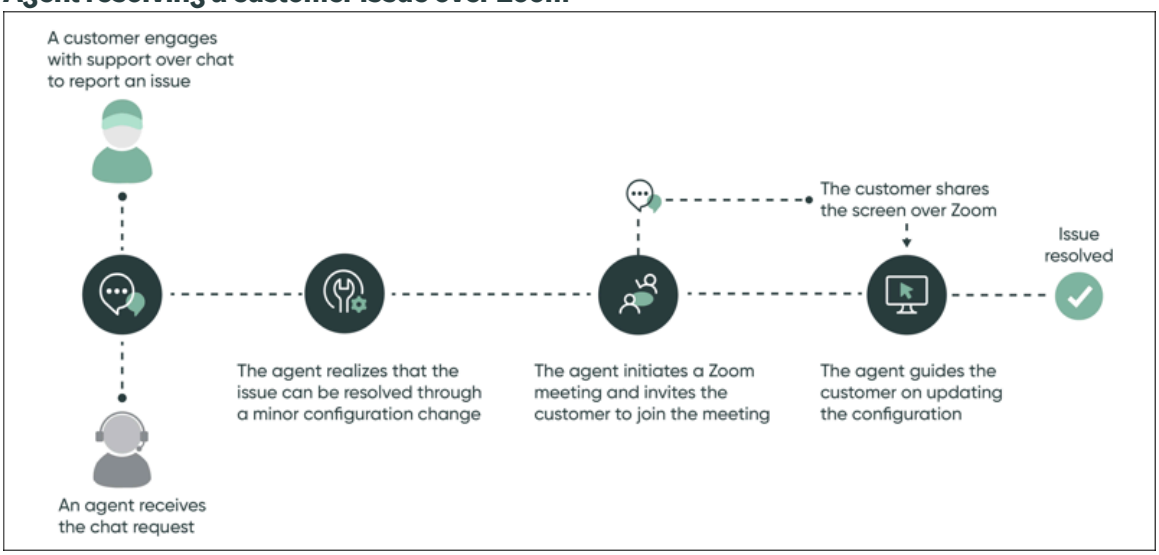
Key features

- Initiate Zoom meetings using the Quick Actions list in chats.
- Track Zoom meetings as interactions on the ServiceNow platform.
- Track participants in Zoom meetings.
- Post the meeting recording to the interaction activity stream.

Example scenario

The following example scenario shows the use of the Chat Zoom Connector application in resolving a configuration issue with an agent initiating a Zoom meeting directly from a customer chat.

Agent resolving a customer issue over Zoom



1. A customer engages with Support over chat to report an issue for a product.
2. An agent receives the chat request and realizes that the issue can be resolved through a minor configuration change.
3. The agent initiates a Zoom meeting using the Quick Actions list in the chat and invites the customer to join the meeting.

   Note: The customer does not need a Zoom account to join the meeting.

4. The customer shares the screen over Zoom and the agent guides the customer on updating the configuration and resolves the issue.

Configure Chat Zoom Connector

Install and set up the Chat Zoom Connector application to interact with customers using Zoom meetings initiated from a chat.

Before you begin
Role required: admin

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About this task

This task provides general steps to set up the Chat Zoom Connector application for initiating Zoom meetings from a chat.

Procedure

1. Integrate the Zoom account of your company with your ServiceNow instance using the Zoom spoke.
   For more information, see Set up the Zoom spoke.
2. Set up the Notify Zoom connector in Zoom for associating the Notify communication channel with Zoom meetings.
   The conference call details of the Zoom meetings are stored in the Notify Conference Calls [notify_conference_call] table. For more information, see Set up Notify Zoom connector.
3. Install the Chat Zoom Connector application.
   For more information, see Install a ServiceNow Store application.

   Note: The Chat Zoom Connector application installs the `CSMZoomInteractionImpl` script include, which is preconfigured for the Customer Service application. It also installs the `sn_chat_zoom.ZoomInteractionExtPoint` extension point, which enables the copying of any application-specific fields from the parent chat interaction record to the Zoom interaction record. For more information, see Configure application-specific field values for Zoom interactions.

4. Activate the Zoom quick action.
   For more information, see Activate the quick action for Zoom meetings.

Related topics

Chat Zoom Connector

Using Chat Zoom Connector

Configure application-specific field values for Zoom interactions

Use scripted extension points to enable the copying of application-specific field values to interaction records for Zoom meetings initiated from chats.

Before you begin

Role required: admin

Install the Chat Zoom Connector application. For more information, see Install a ServiceNow Store application.

About this task

You can enable the copying of any application-specific fields from a parent chat interaction record to its Zoom interaction record by using the `sn_chat_zoom.ZoomInteractionExtPoint` extension point. The parent chat is the chat from which the Zoom meeting was initiated.

By using extension points, you can easily integrate customizations without having to alter the base code. You can extend standard base functionality using customized scripts. For more information, see Using extension points to extend application functionality.

An implementation is available in the base system for scripted extension points. You can modify the data and add additional fields.

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** column, search for and select **sn_chat_zoom.ZoomInteractionExtPoint**.
3. On the Extension Point form, select a script include to use the `sn_chat_zoom.ZoomInteractionExtPoint` extension point.
   - Create and register a custom script include.

     For more information, see Registering custom script includes against the scripted extension points.
   - Modify the existing script include by going to the Implementations related list and selecting a script include in the **Class** column. The script includes are displayed in the **Class** column.

     Note: By default, the `ZoomInteractionExtPoint` and `CSMZoomInteractionImpl` script includes that use the `sn_chat_zoom.ZoomInteractionExtPoint` extension point are available for Global and Chat Zoom Connector applications.

     - The `ZoomInteractionExtPoint` script include for the Global application copies the field values from the parent chat interaction record to the Zoom interaction record.
     - If the Customer Service application is installed, the `CSMZoomInteractionImpl` script include for the Chat Zoom Connector application copies the **Consumer**, **Account**, and **Contact** field values. The values are copied from the interaction record of the parent chat to the Zoom interaction record. This script include is available only when the Customer Service application is installed.
4. Include application-specific fields by adding the `sn_chat_zoom.ZoomInteractionExtPoint` extension point in the script include. You can create multiple implementations for an extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed first.
5. On the Extension Point form, select **Update**.

Activate the quick action for Zoom meetings

Activate the Zoom quick action to initiate Zoom meetings using the quick action from a chat.

Before you begin

Install the Chat Zoom Connector application.

Role required: admin

About this task

By default, the Zoom quick action is inactive. Activate this quick action to enable agents to initiate Zoom meetings from a chat.

Procedure

1. Navigate to **All** > **Quick Actions** > **Actions**.
2. In the **Name** column, search for and select **Zoom**.
3. On the Quick Action form, select the **Active** check box.
4. Select **Update**.

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Result

By default, the Zoom quick action is associated with chats when the Chat Zoom Connector application is installed. In addition, if the Conversational SMS service channel application is installed, the quick action is also associated with SMS conversations. For more information, see Conversational SMS service channel and Quick actions.

Configure Email channel

Configure Email Interaction so incoming customer emails create traceable interactions, route to the right agent group, and stay linked to open cases.

Here's an example of a customer service journey consolidating Email support with omnichannel.

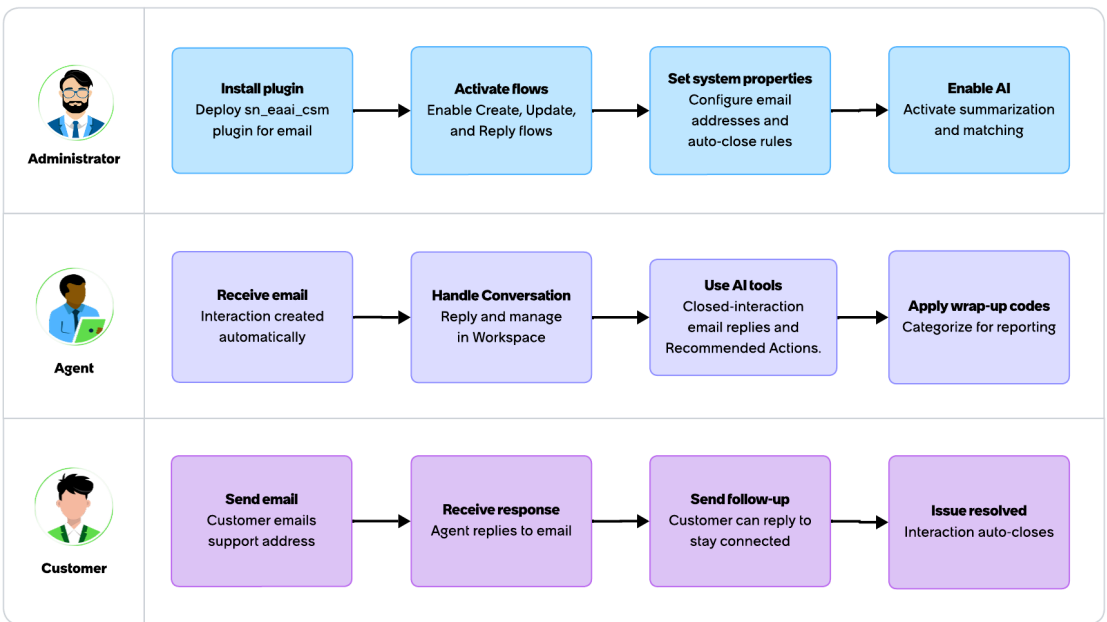
Sophia is a support operations manager at a healthcare software company. Her team was overwhelmed with email volume, managing interactions across email clients, case systems, and chat systems. Case records often had missing or incomplete email history, replies to closed cases created duplicate work, and handling time was hard to predict.

After setting up Email Interaction for CSM, the system creates an interaction (not a case) for new emails. Watermarks thread customer replies to the open interaction. If an agent closes the interaction, replies route to the original linked case instead of creating a new case or interaction.

Sophia's team reduced case volume and eliminated lost emails through reply linking. AI-powered summaries and contextual matching reduced average email handling time.

The following diagram shows the Email configuration workflow for administrators, agents, and customers.

Email configuration workflow



Common configuration steps (required for email)

Every channel (chat, email, WhatsApp) requires the following foundational setup.

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Common configuration steps

	Configuration step	Description	Role
1	Create service channel	Service channel is created automatically during plugin installation for each channel (chat, email, WhatsApp). This is the container that routes customer interactions.	System (automatic)
2	Create a queue	Create a queue under each service channel in Omnichannel > Administration > Queues. The queue holds interactions waiting for an available agent. Each queue has a name, description, and optional schedule for availability windows.	CSM Admin
3	Configure AWA routing	Create an assignment rule in Advanced Work Assignment that determines how interactions are routed to agents. Examples: Most Capacity (assigns to agent with most free time), Least Busy, Round Robin. Create an assignment group with agents who have the required roles (*sn_customerservice_agent*, *sn_customerservice.consumer_agent*, *awa_agent*). Link the rules and group to the queue.	CSM Admin
4	Set agent presence state	Add the channel to the Available presence state, so agents are eligible to receive interactions from that channel. Without this step, the queue has no target agents.	CSM Admin
5	Activate channel in workspace	Verify the channel appears in the CRM Workspace. Agents must see the channel in their workspace interface to receive and manage interactions.	CSM Admin
6	Configure wrap-up codes	Navigate to Interaction > Wrap Up Codes to create categorization codes for interactions. Then navigate to Interaction > Wrap-up configuration to assign these codes so agents can categorize interactions for reporting.	CSM Admin

Email-specific configuration steps

Email-specific configuration steps

	Configuration step	Description	Ro
1	Install Plugin	Install the Email Interaction for CSM plugin (sn_eaai_csm) from System Definition > Plugins. This plugin includes optional demo data and preconfigured Email service channel. For new CSM customers, related flows are enabled automatically. Existing CSM customers must manually activate the Create Interaction from Email, Update Interaction from Email, and Update Case via Reply for Eaal flows in Workflow Studio.	CS Ad
2	Activate Email flows	Manually activate three flows in Workflow Studio. Create Interaction from Email creates a new interaction for each inbound email. Update Interaction from Email updates the interaction when a customer replies. Update Case via Reply for Eaal creates a new linked interaction instead of reopening a closed one. When activating each flow, set the filter to "To contains [your support email address]". This ensures the flow only triggers for the actual support inbox.	CS Ad
3	Set system properties	Navigate to System Properties > All Properties and configure: *sn_eaai_csm.email_addresses* (comma-separated support addresses), *sn_eaai_csm.period_of_customer_inactivity_to_close_interaction* (days before auto-close, default 5), *sn_eaai_csm.email.reroute.enabled*	CS Ad

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Email-specific configuration steps (continued)

	Configuration step	Description	Ro
		(reroute if assigned agent unavailable, default false), *sn_eaai_csm.notify_agent_on_email_linked_to_case* (notify when reply links to open case, default true).	
4	Enable AI assistance (optional)	Check your entitlements to determine whether you have access to Now Assist for CSM. Two Now Assist skills apply and are inactive by default: Email Interaction Summarization (auto-generates email summaries) and Contextual Email Matching (auto-matches incoming emails to open cases). Found under Now Assist Admin > Now Assist Skills > Customer > CSM. These skills are part of ServiceNow's broader Now Assist and Otto AI experience. For more information, see Activate contextual email matching for CSM.	CS Ac
5	Configure wrap-up codes	Navigate to Interaction > Wrap Up Codes, select New, fill in required fields, select Active, then submit. Then navigate to Interaction > Wrap-up configuration to assign wrap-up codes to email interactions for categorization and reporting. For more information, see Use AI to generate wrap up code and notes summary.	CS Ac

Email Interaction

Like chat and phone channels, Email Interaction enables agents to manage email conversations with customers using interaction records. Agents can create cases when further investigation is needed. This approach reduces unnecessary cases and provides a consistent design for omnichannel interactions.

To enable Email Interaction for Customer Service Management (CSM), configure system properties and define flows for processing incoming emails. These flows determine how emails are converted into interactions and, if necessary, into cases.

Additionally, enabling notifications for interactions notifies agents about email responses received from customers, supporting timely responses to customer inquiries.

When a customer replies to an email thread linked to a closed interaction, the system automatically routes the reply to the correct open case or interaction. The system does not create a new interaction. For details, see Email reply linking for closed interactions.

Check your entitlements to determine whether you have access to generate AI summaries of email interactions on demand. For details, see AI summarization of email interactions.

Activate Email Interaction for CSM

Activate the Email Interaction for CSM plugin (sn_eaai_csm) for new or existing CSM customers. This plugin includes demo data and activates related plugins if they aren't already active.

Before you begin

Role required: admin

About this task

The flows are deployed with Email Interaction for CSM and are enabled by default for new CSM customers. The flows aren't enabled by default for existing CSM customers. To manually activate the flows, Activate a flow for Email Interaction for CSM

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
   The Review Installation Details dialog is displayed.
2. Find the Email Interaction for CSM using the filter criteria and search bar.

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The app is available in the Store applications section.

3. Start the installation process by selecting **Install**.
   The Review Installation Details dialog box is displayed.
4. Review the details of the installation.
5. Verify that the **Install now** option is selected.
6. **Optional:** If you want to get the demo data, select the **Load demo data** check box.
7. Select **Install**.

Result

The Email Interaction for CSM plugin is successfully installed.

View the service channel configured with Email Interaction for CSM

View the service channel configured during the installation of the Email Interaction for CSM application. This service channel facilitates the routing of email interactions through Advanced Work Assignment.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Service Channels**.
2. View the **Email** service channel.

Configure Advanced Work Assignment for routing email interactions

Configure Advanced Work Assignment (AWA) to route email interactions automatically to your agents, based on their availability, capacity, and optionally, skills.

Before you begin

Role required: admin

About this task

The Service channel **Email** is configured during the installation of the Email Interaction for CSM application.#If you want to create service channels for email, follow the procedure.

You can use the#Advanced Work Assignment (AWA) feature to automatically assign work items to users based on their availability and capacity.

Note: You can also configure external routing with third-party providers. For more information, see Enable external routing for queues.

AWA assigns work items using assignment groups, so it's important that your users and groups are set up correctly.

- Determine the assignment group to use in the AWA service channel configuration and add users to this group.
- Confirm that the users have at least one of the roles: sn_customerservice.consumer_agent or sn_customerservice_agent.

Setting up a service channel involves multiple steps, which are detailed in the procedure. Once the service channel setup is complete, you can use AWA to assign newly created email interactions that either unassigned or satisfy the conditions specified in the service channel.

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Procedure

1. Create the email service channel.

   a. Navigate to#**All** > **Advanced Work Assignment** > **Settings** > **Service Channels** > **New**

   b. Fill in the fields on the Service Channel form.

   Service channel form

Field	Description
Name	Name of the service channel that you're configuring. For example, Custom-Email.
Inbox order	Order in which channel items appear in the user inbox. The#**Inbox Order**# field is an integer#field type. This field can store whole numbers.
Application	Name of the application. For the Email Interaction channel, select Email Interaction for CSM.
Active	Option for activating the service channel. When you select this option, the associated queues for the service channel can start accepting work items.
Short description	Brief description of the service channel.
Table	Table that stores the service channel records. To route email interactions, select the Interaction table.
Assign to field	Field that references the user that the item is assigned to. For the Interaction table, this field is the **#Assigned to#field** (assigned_to) field.
Assignment group field	Field that references the assignment group that the item is assigned to. For the Interaction table, this field is the #**Assignment group#field** field.
Advanced condition	Advanced conditions that apply to the channel.
Default work item size	Amount of a user's capacity that is used if this work item is assigned. The default is 1.
Default capacity	Number of items automatically assigned to agents (pending overrides). The default for this field depends on the type of work item.
Utilization condition	Condition that determines what constitutes an active item that counts toward user workload/capacity.

   c. Select **Submit**.

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The system adds the Email Interaction channel to the Service Channels list. For more information, see#Create or configure a service channel.

2. Configure the layout for the email interaction inbox card.

   Note: The Inbox layouts are configured during the installation of the Email Interaction for CSM application.

   #If you want to create Inbox layouts follow the procedure in Create or modify an inbox layout for **Email** service channel, available by default, or **Custom-Email** service channel.

3. Create a queue for the email interaction service channel.

   a. In the Queue related list of the service channel, select#**New**.

   b. On the form, fill in the fields.

   Queue form

Field	Description
Name	Name of the queue. For example, Email Queue.
Short description	Brief explanation of the queue. For example, "Assign email interactions to front-office users".

   For more information about configuring a queue, see#Create a work item queue.

   c. Select **Submit**.

4. Create an assignment rule for the queue.

   a. Navigate to#**All** > **Advanced Work Assignment** > **Settings** > **Assignment Rules**.

   b. Select **New**.

   c. On the form, fill in the fields.

   Assignment rules field description

Field	Description
Name	Name of the assignment rule.
Short description	Brief description of the assignment rule. For example, Assign the email interactions based on this configuration.
Assign by	Type of assignment. Select **Most Capacity**, which routes a work item to the user who has the greatest availability for handling the work.

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Field	Description
Allow agents to reject	Option to enable agents to reject work items in their inbox.

For more information about creating an assignment rule, see#Configure agent assignment rules.

5. Create a group for the queue.

   a. Navigate to#**All** > **Advanced Work Assignment** > **Management** > **Groups.**

   b. Select **New**.

   c. On the Group form, fill in the fields.
   For more information about creating a group, see Create or change groups for Advanced Work Assignment queues.

   d. Select **Submit**.

   e. Select the group to display the Group form.

   f. In the Group Members related list, add users to the group.

   The users that you add to the group for the Email Interaction Assignment queue require the roles.

   - Customer agent (sn_customerservice_agent)
   - Consumer agent (sn_customerservice.consumer_agent)
   - AWA agent (awa_agent)

6. Associate the assignment rule with the queue.

   a. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Queues**.

   b. Select the queue.
   For example, Email Queue.

   c. In the Assignment Eligibility related list on the Queue form, select **New**.

   d. In the **Agent assignment rule** field, select the assignment rule.

   e. In the **Groups** field, select the assignment group.

   f. Select **Submit**.

7. Activate the service channel.

   a. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Presence States**.

   b. Select the **Available** presence state.

   c. Add the email service channel to the **Selected** column.

   d. Select **Update**.

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Result

After the service channel is activated, you can use it to assign work items. For more information, see Service channels.

Configure flows for incoming emails that create and update interactions

The default email flows are available once you activate the Email Interaction for CSM application. Enable the email flows to activate email processing for automatic creation and updating interactions.

- **Create Interaction from Email**: Creates an interaction of type Email for each new inbound email from a customer.
- **Update Interaction from Email**: Updates the interaction with the reply email received from the customer.

  If a reply email is received on a closed interaction, a new interaction of type Email is created. It includes the link to the previous closed interaction.

- **Update Case via Reply for Email**: Updates the case record with the reply email received from Customer on the case.

  This flow creates an interaction of type Email if a reply email is received on the closed case record. The new interaction includes a link to the closed case.

Alternatively, customers can use Inbound Actions to create and update email interactions.

The execution order of the Inbound Flows takes a higher precedence over Inbound Actions meaning that when an email flow executes, it helps prevent execution of Inbound Actions.

Activate a flow for Email Interaction for CSM

Activate flows for customers who have the Email Interaction for CSM application configured, enabling efficient workflow automation.

Before you begin

Role required: admin

About this task

For new CSM customers, the inbound actions are activated by default. Existing CSM customers should activate email interaction related flows and deactivate the case related flows.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Open a flow from the available flows.
   - Create Interaction from Email
   - Update Interaction from Email
   - Update Case via Reply for Eaal
3. Select **AND**.
4. Select the filter condition: **To** contains **customerservice@example.com**.

   Note: **customerservice@example.com** is a sample email address. Specify the actual email address that should be configured as the default for creating email interactions.

5. Activate the selected flow by selecting **Activate**.

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Result

All the available flows are activated.

Define a custom flow to create or update email interactions

Define email-related business processes using Workflow Studio. This tool enables you to manage emails along with your customer service processes through a visual interface without having to design or request complex scripts.

Create an interaction

Create an interaction record to capture customer details.

Before you begin

Role required: workspace_admin, awa_agent, sn_customerservice_consumer_agent, or sn_customerservice_agent

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Create a flow.
   a. Select **Flows**.
   b. Select **New**.
   c. Select **Flow**.
   d. In the **Flow name** field, enter the flow name.
   e. Select the application scope from the Application list.
   f. In the **Description** field, enter the description.
   g. Select **Show additional properties**.
      To know more about additional properties, see Create a flow in Workflow Studio.
   h. Select **Build flow**.
3. Create a trigger.
   a. Select **Add a Trigger**.
   b. Search and select **Application**.
   c. Select **Inbound Email**.
   d. Select Email conditions with **AND** operator.
      - Select **Type** is **received**.
      - Select **Receive type** is **New**.
      - Select **To** contains **customerservice@example.com**.

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> **Note:** **customerservice@example.com** is a sample email address. Specify the actual email address that should be configured as the default for creating email interactions.

e. Leave the Reply Record Type as empty.

f. Select **Done**.

4. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow

> **Note:** After you have created action entries, you can select multiple actions using **Select multiple**.

5. **Optional:** Add error handler.
   a. To enable the error handling, slide the **ERROR HANDLER** toggle switch.
   b. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow
6. Verify the email flow and modify it if necessary.
7. Select **Save**.
8. Select **Activate**.
9. From the confirmation dialog box, select **Activate**.

Related topics

Create a flow in Workflow Studio

Update an interaction

Modify existing interaction records, verifying that all email communication details are updated.

Before you begin

Role required: admin, workspace_admin, awa_agent, sn_customerservice_consumer_agent, or sn_customerservice_agent

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Create a flow.

   a. Select **Flows**.

   b. Select **New**.

   c. Select **Flow**.

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d. In the **Flow name** field, enter the flow name.

e. Select the application scope from the Application list.

f. In the **Description** field, enter the description.

g. Select **Show additional properties**.
To know more about additional properties, see Create a flow in Workflow Studio.

h. Select **Build flow**.

3. Create a trigger.

a. Select **Add a Trigger**.

b. Search and select **Application**.

c. Select **Inbound Email**.

d. Select Email conditions with **AND** operator.
   - Select **Type** is **received**.
   - Select **Receive type** is **Reply**.

e. Leave the Reply Record Type as empty.

f. Select **Done**.

4. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow

Note: After you have created action entries, you can select multiple actions using **Select multiple**.

5. **Optional:** Add error handler.

a. To enable the error handling, slide the **ERROR HANDLER** toggle switch.

b. Select **Add an Action, Flow Logic, or Subflow** and select any of the following.
   - Action
   - Flow Logic
   - Subflow

6. Verify the email flow and modify it if necessary.
7. Select **Save**.
8. Select **Activate**.
9. From the confirmation dialog box, select **Activate**.

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Related topics

Create a flow in Workflow Studio

System properties for configuring Email Interaction

You can manage certain workflows based on system properties, such as enabling or disabling the creation of email interactions for guest users. You can set an inactivity period after which email interactions are automatically closed. Configure the system to create single or multiple outbound email interactions when different agents contact the same customer, enable rerouting, and set reminder periods.

Navigate to **All>System Properties>All Properties**.

Alternatively, in your instance, enter `sys_properties.list` in the filter navigator and customize the Email Interaction system properties.

System properties for Email Interaction

Property	Description
sn_eaai_csm.create_interaction_for_non_matched_user	Enable or disabl for a non-match • Type: Boolear • Default value: • Location: **All** > **All Properties**
sn_eaai_csm.period_of_customer_inactivity_to_close_interaction	Set the inactivity which an interac email is receive • Type: Integer • Default value: • Location: **All** > **All Properties**
sn_eaai_csm.email_addresses	Specify the defa creating email ir contain a comm email addresses of these addres interactions. • Type: String • Default value: customerserv **Note:** customer is a samp • Location: **All** > **All Properties**

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System properties for Email Interaction (continued)

Property	Description
period_for_reminders_to_customers_interaction	Specify the num an automatic em to customers. Th how long the sys receiving the las from the custom reminder. Remin interactions that **Note:** The positive inte to zero or a system defa • Type: Integer • Default value: • Location: **All >** **All Properties**
sn_eaai_csm.email.reroute.enabled	Enable or disabl interactions that • Type: Boolean • Default value: • Location: **All >** **All Properties**
sn_eaai_core.create_outbound_interaction_per_agent.target_tables	Specify a comm target tables for interaction is cre agents initiate o for the same cus is listed, a new c is created for ea initiated by diffe same customer. listed, all agent c into a single WIP ownership assig agent. • Type: String • Default value: • Location: **All >** **All Properties**
sn_eaai_csm.email.reroute.enabled	Enable reroutin interactions to a the assigned ag

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System properties for Email Interaction (continued)

Property	Description
	handle a custom set to false, the i updated to Work rerouting. • Type: Boolean • Default value: • Location: **All** >**All Properties**
period_for_reminders_to_customers_interaction	Specify the time after which a rem customers who an outbound int value is 1 hour. T for sending remi hours. Only outb at least one age considered. • Type: Integer • Default value: • Location: **All** >**All Properties**
sn_eaai_csm.notify_agent_on_email_linked_to_case	Enable or disabl when a custome to their open cas true, the assigne a notification. W notification is se • Type: Boolean • Default value: • Location: **All** >**All Properties**

Related topics

Display the most recent reply in the Activity stream

AI summarization of email interactions

Email Interaction uses AI to generate summaries of email threads, reducing the time agents spend reading full conversation histories. Summaries can be generated on demand.

Note: Check your entitlements to determine whether you have access to AI summarization for email interactions.

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AI summarization capabilities

AI summarization for email interactions uses ServiceNow Otto generative AI capabilities to analyze email conversation threads, work notes, and comments, and generate summaries. This helps agents quickly grasp the essential information from lengthy email exchanges, reducing the time needed to understand customer issues and responding more efficiently.

The AI summarization feature processes email content, identifies key topics and action items, then presents this information in a structured format that agents can review briefly.

How summaries are generated

The system generates a summary based on the full email activity stream of the interaction, including work notes when available. The summary is displayed in a summary card on the email interaction page.

When an agent is working on an email interaction and needs an on-demand summary, the agent selects **Summarize**. The system generates a summary of the full email activity stream and displays it in the **Interaction Summary** card on the interaction page.

Note: Currently, only agent-initiated summarization is supported.

Summary storage and refresh

Summaries are generated on demand and aren't stored on the interaction record. Each time an agent selects **Summarize**, the system generates a new summary based on the current email thread.

A refresh option is available on the **Interaction Summary** card when new work notes are added after a summary has been generated. The refresh option for emails is not yet available.

Summary components

The **Interaction Summary** card displays the following components based on the email thread content:

Issue

A concise overview of the primary customer concern or request based on the email content, as shown in the **Interaction Summary** card.

Key Actions Taken

Actions taken by the agent and customer throughout the email thread.

Next Steps

Recommended or identified next steps based on the email conversation.

AI limitations

When using AI summarization for email interactions, consider the following limitations:

- AI-generated summaries may not capture all nuances of human communication and should be reviewed by agents for accuracy.
- Complex technical discussions or specialized terminology may not be fully interpreted by the AI model.
- Summaries are based on available email content and may not include context from other communication channels.

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- The quality of summaries depends on the clarity and completeness of the original email content.
- Agents should use AI summaries as a starting point for evaluating email interactions while applying their professional judgment and reviewing original content when necessary.

Related topics

Using Email Interaction for Customer Service Management

System properties for configuring Email Interaction

Configure an ongoing notification for email interactions

Configure an ongoing notification for email interactions. Configure the ongoing menu item on the toolbar in the CSM Configurable workspace for agents.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Settings** > **Presence States**.
2. From the Service channels section, from the Available list, select **Email** (or a custom email channel) and **Chat – Asynchronous**.
3. Add the selected items to the Selected list.
4. Select **Update**.

Enable agents to respond to customers with email activity history

Enable agents to respond to customers with email activity history, which is created by embedding a mail script in an email client template.

Before you begin

Role required: admin, sn_esm_agent

Note: Agents need the sn_esm_agent role to view the email client and email templates.

Procedure

1. Navigate to **All** > **Email Client** > **Email Client Templates**.
2. Search and select **Email response to customer**.

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

3. In the#**Body HTML** field, enter `<div id="collapsible-content">${mail_script:get_email_interaction_activity_history_for_reply}</div>`.

   Note:

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- The number of emails in the activity history matches the value set in the system property, number_of_activities_in_notification.
- You can also create a client template and map it to the Interaction table. For more information, see Create an email client template.

4. Select **Update**.

Result

The get_activity_of_case_and_related_interaction_for_email script retrieves and formats cases and related interaction email history, adding it to the email client in the agent workspace. The content is hidden behind ellipses within a DIV tag with the ID “collapsible-content".

Related topics

Send case email replies with interaction email history

Configure email notifications for an interaction

Configure email notification to determine whether they should be sent to the contact, consumer, or guest.

Before you begin

Role required: admin

About this task

Email notifications that are available by default:

- Interaction created for consumer
- Interaction created for guest
- Interaction created for contact

You can customize the existing notification or create a notification. For more information, see Email and SMS notifications.

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Select the Show column search row icon ( ).
3. In the#**Name** column, search for any of the following notification.
   - Interaction created for consumer
   - Interaction created for guest
   - Interaction created for contact
4. If you want to disable notifications, update **Active** to False.
   a. Select **here**.
   b. Clear the **Active** check box.
   c. Select **Update**.
5. If you want to include different content, update the email template.
   a. Select **What it will contain**.
   b. From the **Email template** field, remove the existing template.

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c. Search and select the email template.
Alternatively, in the **Message HTML** field, enter the content for the email template.

d. Select **Update**.

Result
Email notifications are disabled for contact, consumer, or guest.

Configure email reminders for an interaction

Set up automatic email reminders to notify customers to respond to interactions that are in the On Hold state due to pending customer responses.

Before you begin
Role required: admin

About this task
Email notifications that are available by default:

- Email reminder for consumer
- Email reminder for guest
- Email reminder for contact

You can customize the existing notification or create a notification. For more information, see Email and SMS notifications.

Procedure

1. Navigate to **All** > **System Notifications** > **Email** > **Notifications**.
2. Select the Show column search row icon ( ).
3. In the#**Name** column, search and select for any of the following notifications.
   - Email reminder for consumer
   - Email reminder for guest
   - Email reminder for contact
4. To turn off notifications, update **Active** to False.
   a. Select **here**.
   b. Clear the **Active** check box.
   c. Select **Update**.
5. To include different content, update the email template.
   a. Select **What it will contain**.
   b. Remove the exiting template from the **Email template** field.
   c. Search and select the email template.
   Alternatively, in the **Message HTML** field, enter the content for the email template.
   d. Select **Update**.

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Enable Recommended Actions for an email interaction

Help the agent to find relevant resources based on the context of an email by enabling recommended actions.

Before you begin

Role required: admin

About this task

For more information, see Configuring Recommended Actions.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select **CSM Interaction context**.
3. Set the **Active** column as true.

Customize the email interaction experience

Customize the Email Interaction record page in UI Builder for agents.

Before you begin

Role required: admin

About this task

For more information on UI Builder, see UI Builder.

Procedure

1. Navigate to **All** > **Now Experience Framework** > *`UI Builder`*.
2. On the UI Builder page, select **Experiences** tab.
3. On the Experiences page, search and select **CSM/FSM Configurable Workspace**.
4. Navigate to **Pages and variants** > **Record** > **Email Interaction Page**.
5. Select the Open menu icon.
6. Select **Duplicate variant**.
   For more information, see Create a page variant.
7. On the Tell us about your variant screen, enter `Custom Email Interaction Page` in the **Name** field.

   Note: Don't change the **Conditions** field.

8. Select **Create**.
   The Page variant opens.
9. Select the **Settings** tab.
10. Enter a lower value in the **Order** field.
    For example, -1100.
11. Select **Save**.

Result

You can customize the page in the UI builder.

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Customize the New Activity marker for an email interaction

Customize the New Activity marker in UI Builder to differentiate between the latest activities for agents.

Before you begin

A duplicate variant must be configured by an administrator. If the duplicate variant isn't configured, you can't enable or disable the New Activity marker. For more information, see Customize the email interaction experience.

Role required: admin

About this task

For more information on UI Builder, see UI Builder.

Procedure

1. Navigate to **All** > **Now Experience Framework** > *UI Builder*.
2. On the UI Builder page, select **Experiences** tab.
3. On the Experiences page, search and select **CSM/FSM Configurable Workspace**.
4. Navigate to **Pages and variants** > **Record** > **Email Interaction Page**.

   Note: The Email Interaction Page variant is the newly created variant.

5. Select **Editor**.
6. In the Content section, search and select **Activity Stream 1**.
7. In the Activity Stream 1 panel, navigate to **Configure** > **Display**

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

8. Turn on the **Show New Activity Marker** toggle switch.
9. Select **Save**.

Result

You can view the New Activity marker in the email conversation within the activity stream.

Customize an email compact header for an email interaction

Customize an email compact header within the UI Builder to view information such as the email subject, sender, and receiver in a compact format.

Before you begin

A duplicate variant must be configured by an administrator. If the duplicate variant isn't configured, you can't enable the email compact header. For more information, see Customize the email interaction experience.

Role required: admin

About this task

For more information on UI Builder, see UI Builder.

Note: By default, **Show Email Compact Header** is enabled for Email Interaction for CSM.

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Procedure

1. Navigate to **All** > **Now Experience Framework** > *UI Builder*.
2. On the UI Builder page, select **Experiences** tab.
3. On the Experiences page, search and select **CSM/FSM Configurable Workspace**.
4. Navigate to **Pages and variants** > **Record** > **Email Interaction Page**.

   Note: The Email Interaction Page variant is the newly created variant.

5. Select **Editor**.
6. In the Content section, search and select **Activity Stream 1**.
7. In the Activity Stream 1 panel, navigate to **Configure** > **Display**

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

8. Turn on the **Show Email Compact Header** toggle switch.
9. Select **Save**.

Result

You can view information such as the email subject, sender, and receiver in a compact format within the activity stream.

Customize showing a full conversation in UI Builder

Customize the show full conversation feature in UI Builder to display the entire email thread between the customer and agent.

Before you begin

A duplicate variant must be configured by an administrator. If the duplicate variant isn't configured, you can't enable Show full conversation. For more information, see Customize the email interaction experience.

Role required: admin

About this task

For more information on UI Builder, see UI Builder.

Note: By default, **Enable Email Show full conversation** is enabled for Email Interaction for CSM.

Procedure

1. Navigate to **All** > **Now Experience Framework** > *UI Builder*.
2. On the UI Builder page, select **Experiences** tab.
3. On the Experiences page, search and select **CSM/FSM Configurable Workspace**.
4. Navigate to **Pages and variants** > **Record** > **Email Interaction Page**.

   Note: The Email Interaction Page variant is the newly created variant.

5. Select **Editor**.
6. In the Content section, search and select **Activity Stream 1**.

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7. In the Activity Stream 1 panel, navigate to **Configure** > **Display**

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

8. Turn on the **Email Show Full Conversation** toggle switch.
9. Select **Save**.

Result

You can view the entire conversation within the activity stream.

Configure wrap-up codes for email interactions

Configure internal wrap-up codes that agents use to categorize email interactions when closing them. Wrap-up codes work with both AWA-routed and CCaaS-routed email interactions.

Before you begin

Default wrap-up codes are read-only. The system uses ACLs to restrict list-edit operations and data policies to restrict edits in form view. You can't configure multiple default wrap-up codes for different use cases. For more information on wrap-up codes, see Wrap-up codes for email interactions.

Role required: admin

Procedure

1. Navigate to **All** > **Interaction** > **Wrap Up Codes**.
2. Select **New**.
3. Enter the required details.
4. Select the **Active** check box.
5. Select **Submit**.

Result

The wrap-up code is created. To make it available to agents, associate it with the email interaction wrap-up configuration. See Associate wrap-up codes with email interactions.

Associate wrap-up codes with email interactions

Associate wrap-up codes with the email interaction wrap-up configuration so that agents can select them when closing an interaction.

Before you begin

A wrap-up code must be created. See Configure wrap-up codes for email interactions.

Role required: admin

Procedure

1. Navigate to **All** > **Interaction** > **Wrap-up configuration**.
2. Select **Wrap Up for Email Interactions**.
3. **Note:** If a message appears about the application scope, select **here** to be able to edit the record.
4. Select **Codes**.
5. From the Available list, select the wrap-up code.

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6. Select the arrow (>) icon to move it to the Selected list.
7. Select **Save**.

Result
The configured wrap-up codes are available to agents when closing email interactions.

Activate contextual email matching for CSM

Activate the Contextual Email Matching skill in AI Skill Kit to link emails received on closed interactions by analyzing open cases linked to the closed interaction, enabling downstream flows to associate interactions with cases.

Before you begin
Confirm the following prerequisites are met before you begin:

- The Email Interaction for CSM plugin must be installed and active on your instance.
- A ServiceNow Otto for CSM license must be active on your instance.

Role required: sn_nowassist_admin.nsa_admin

About this task
The Contextual Email Matching skill analyzes emails on closed interactions and identifies the most relevant open case based on the content and context of the email. The skill provides a recommended case match that downstream flows can use to associate the interaction with the correct case.

Procedure
1. Navigate to **Admin** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Customer** > **CSM**.

   Note: Default skills cannot be edited. To modify the prompt or skill configuration, duplicate the skill, make your changes, and then publish the duplicated skill.

3. Locate the **Contextual Email Matching** skill and select it to open the skill details.
4. Select **Activate skill**.

   Note: By default, the skill is inactive.

5. Complete the guided setup.
6. In **Review and activate**, review your configuration.
7. Select **Activate**.

Result
The Contextual Email Matching skill is active. When an email on a closed interaction is received, the skill analyzes closed email interactions and returns a recommended case match that downstream flows can use to link the new email to the correct open case.

Activate email interaction summarization for CSM

Activate the Email Interaction Summarization skill in AI Skill Kit to generate AI-powered summaries of email interactions for CSM agents, reducing the time spent reviewing full email conversation histories.

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Before you begin

Confirm the following prerequisites are met before you begin:

- The Email Interaction for CSM plugin must be installed and active on your instance.
- A ServiceNow Otto for CSM license must be active on your instance.

Role required: sn_nowassist_admin.nsa_admin

About this task

The Email Interaction Summarization skill generates summaries of email threads, helping agents quickly understand the context of a customer interaction without reading the full conversation history. Summaries are generated on demand when an agent selects the summarize option on an email interaction.

Note: AI-generated summaries may not capture all nuances of the email conversation. Agents must review summaries for accuracy before acting on them.

Procedure

1. Navigate to **Admin** > **Now Assist Admin** > **Now Assist Skills**.
2. Select **Customer** > **CSM**.
3. On the **Now Assist for CSM** skills for page, locate the **Email Interaction Summarization** skill and select it to open the skill details.
4. Select **Activate skill**.

   Note: By default, the skill is inactive.

5. Complete the guided setup.
6. In **Review and activate**, review your configuration.
7. Select **Activate**.

Result

The Email Interaction Summarization skill is active. Agents can select the summarize option on an email interaction to generate an on-demand summary of the email thread.

Email to case

Set up email addresses that customers can use to submit cases to your team. To help assign cases to specific teams, you can designate email addresses to specific products. While agents work on the cases, they can also email customers with updates and proposed solutions.

Customer Service Management uses the Email Accounts application to create and maintain email accounts. The system administrator can create multiple incoming email addresses that customers can use to communicate with customer service agents. The system administrator can also create one outgoing email address.

After the incoming and outgoing email addresses are created, the system administrator can set the following properties for the email communication channel:

- Establish one of the incoming email addresses to automatically create a case.
- Enable a prefix to include in the subject line of an email to any of the incoming email addresses that automatically creates a case.
- Create cases for customers who are not currently in the system.

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The system administrator can also create a channel configuration to associate any of the incoming email addresses with specific products.

Related topics

Configure an email address for a product

Email accounts

Configure an email address for a product

Configure an email address that creates a case for a specific product.

Before you begin

Role required: admin

About this task

Create a configuration that links a product to a specific email address. This configuration is created in the Channel Configuration (sn_customerservice_channel_config) table.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Channels**.
2. Select **New**.
3. On the Channel Configurations form, fill in the fields.

Channel Configurations form

Field	Description
Name	Name of the email configuration.
Channel Type	Configuration type for this email address. Always **Email**.
Product	Product model associated with this email configuration.
Active	Option to activate the email configuration.
Email address	One of the incoming email addresses created earlier in the Email Accounts application.

4. Select **Submit**.

Configure an email subject line prefix

Configure a prefix to include in an email subject line that creates a case.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. In the **Email subject prefix format for new case** field, enter the prefix.
   The default prefix is **Case:**.
3. Select **Save**.

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Customer service email properties

Users with the system administrator role can set several properties for the Customer Service Management email communication channel.

After creating the incoming and outgoing email addresses that customers use to communicate with customer service agents, the system administrator can set the following email-specific properties.

Navigate to **Customer Service** > **Administration** > **Properties** to access these properties.

Customer Service Management email properties

Property	Definition
Case email address [glide.cs.email.case_queue_address]	One of the incoming email addresses that automatically creates a customer service case. For incoming email, the system checks the address to see if it matches the address in the **Case email address** property. If yes, the system creates a customer service case. If it does not match, or if this property is not set, the system then checks the **Email subject prefix format for new case** property.
Email subject prefix format for new case [glide.cs.email.new_case_prefix]	The prefix included in the subject line of an email to any of the incoming email addresses that automatically creates a customer service case. This field is automatically set to **Case:** as the default prefix.
Create case for non matched user [sn_customerservice.email.create_case_for_non_matched_user]	Enable creating of new customer service cases when a sender's email address isn't in the system yet.
Number of activities [number_of_activities_in_notification]	Indicates the number of activities (emails and comments) in the activity history that are included in the email notifications and replies. The default value is 3.
Include system emails in email notifications [include_system_emails_in_notification]	Indicates whether system emails are included in email notifications. The default value is false.
Number of activities in reply number_of_activities_in_reply	Number of additional comments and emails included in Reply/Reply-All templates (-1 means all)
Email history notifications	By default, the email history shows the last three messages in the case record. To show every activity on a case record instead, add this script `${mail_script:get_emails_comments_activity_history` to the email reply system property (reply-received) and the case commented system property (case.commented.for.customer). For more information, refer to Configure email and comment notifications .

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Disable email responses from the case activity stream

Disable email responses from the case activity stream. Stop agents from interacting with customers directly.

Before you begin

Role required: admin

About this task

By default, customer service agents can respond to cases using options within a customer email thread instead of having to use another email client. Agents can use the **Reply**, **Reply All**, and **Forward** buttons in the case activity stream to respond to customer emails.

You can disable this and hide these buttons in the Agent Workspace or Configurable Workspace application.

Procedure

1. Navigate to **All** and enter `sys_properties.list`.
   The System Properties page opens.
2. Select **New**.
3. Create a system property with the name *`sn_agent_workspace.activity_email_options_enabled`*.
4. Set the value to false.
5. Select **Submit**.

Result

Users with the role sn_customerservice_agent are now unable to reply to or forward emails.

Configure rules for incoming emails to create cases

Create your email-related business processes using Inbound Email Flows. After you receive an email on a specified support email address, you can define rules to create cases and assign the cases to specific teams.

In previous releases, incoming emails were processed through inbound email actions. Admins created separate email actions to support different business flows using scripts.

Inbound Email Flows provide powerful configuration capabilities to manage emails along with your customer service processes through a visual Flow Designer interface. Business managers can define inbound email flows without having to depend on admins or developers to write complex scripts. Email flows use conditional logic to incorporate multiple business processes in one flow.

> **Note:** The **Email conditions** under the **Inbound Email** trigger are case sensitive. Review your flow designer conditions and consider lowercase and uppercase options depending on how the sender puts the email address in the headers.

The following example email flows are available by default after you activate the Customer Service Management plugin. Enable the email flows for activating the email processing rules to automatically create and update cases.

- Create case from email
- Update case using Reply

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Note:

- The execution order of the inbound email flows comes before inbound actions (that is if an email flow executes, it skips execution of inbound actions).
- The user who sends an email should have the necessary roles to perform operations specified in the flow, or else the operation stops while executing.

The following example email flows are installed with the platform. These flows aren't required for any of the CSM email processing rules:

- Handle email replies
- Logging a problem

Related topics

Define rules to process incoming emails

Activate Customer Service Management

Define rules to process incoming emails

Define your email-related business processes using Inbound Email Flows. Manage emails along with your customer service processes through a visual **Flow Designer** interface without having to design or request complex scripts.

Before you begin

Role required: admin, sn_customerservice_manager

About this task

Email flows use conditional logic to incorporate multiple business processes into one flow. When designing inbound email flows, note the following:

- The execution order of the inbound email flows comes before inbound actions. For example, if an email flow executes, it prevents the execution of inbound actions.
- The user who sends an email should have the necessary roles to perform the operations specified in the flow. Otherwise the system stops the operation.

Procedure

1. Create an inbound email flow.

   a. Navigate to **All** > **Process Automation** > **Flow Designer**.

   b. Select one of the following flows.

      - **Create Case from Email**: Creates a case when a user sends a new email.
      - **Update Case via Reply**: Updates a case when you use the reply option.

   c. Select **Edit Flow**.

   d. Select the **Inbound Email** trigger.

   e. Modify the default email filter conditions or select **New Criteria** to add conditions.

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f. Select a Reply Record Type table.

g. Select **Done**.

2. Edit the flow.
   a. Select an existing action and expand it.
   b. Provide information for the action or select the add icon (+) to add a new action, flow logic, or subflow.
   c. Select **Done**.
3. Finalize the rule.
   a. Verify the email flow and modify it if necessary.
   b. Select **Save**.
   c. Select **Activate**.
4. Select **Activate**.
   The defined inbound email flow is activated.

Related topics

Building flows

Building custom actions

Configure email and comment notifications

Add a script to the email reply or case comment template to include all case activities in email replies and notifications.

Before you begin

Role required: admin

Procedure

1. Update comment notifications.
   a. Navigate to **All** > **System Notifications** > **Notifications**.
   b. In the **Email template** column, enter `case.commented.for.customer`.
   c. In the *`case.commented.for.customer`* system property, add the following script to the **Message HTML** field: `${mail_script:get_emails_comments_activity_history}`.
   d. Save the field.
2. Update email notifications.
   a. Navigate to **All** > **Email client templates** > **Reply**.
   b. In the *`reply-received`* system property, add the following script to the **Body HTML** field: `${mail_script:get_emails_comments_activity_history}`.
   c. Save the field.

Result

All emails and comments are now included in the email replies and notifications.

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Send case email replies with interaction email history

Include emails from related interactions in agent case email responses to provide full context of prior email communications. You can create history by embedding an email script within an email client template.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Email Client** > **Email Client Templates**.
2. Search and select **reply-for-customer-service**.

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

3. On the Content tab, in the#**Body HTML** field, enter `<div id="collapsible-content">${mail_script:get_activity_of_case_and_related_interaction_for_email}</div>`.

   Note:

   - The number of emails in the activity history matches the value set in the system properties, *`include_system_emails_in_notification and number_of_activities_in_reply`*.
   - You can also create a client template and map it to the Interaction table. For more information, see Create an email client template.

4. Select **Update**.

Result

The get_activity_of_case_and_related_interaction_for_email script retrieves and formats cases and related interaction email history, adding it to the email client in the agent workspace. The content is hidden behind ellipses within a DIV tag with the ID “collapsible-content".

Related topics

Enable agents to respond to customers with email activity history

Configure Voice

Configure phone support for customers with Computer Telephony Integration (CTI), OpenFrame, and Interaction Controls Component (ICC) integrations.

Integrate your CRM Workspace with Computer Telephony Integration (CTI) to enable and support voice features in your Workspace. See Integrating with Computer Telephony Integration (CTI).

Create an OpenFrame configuration

This configuration specifies the OpenFrame window settings and the URL to be launched within OpenFrame.

Configure OpenFrame events

Use OpenFrame events to achieve better integration between Advanced Work Assignment AWA and Computer telephony integration (CTI) and aide in improved call routing.

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Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations

The Interaction Controls Component (ICC) feature enables CCaaS providers to display native voice and callback integrations so agents can manage customer calls directly from their Workspace. Implement prebuilt, certified integrations with Contact Center as a Service (CCaaS) providers using the ServiceNow Voice architecture.

Configuring Omnichannel Callback for Customer Service Management

Installing and configuring Omnichannel Callback for Customer Service Management enables your customers to request a callback from various channels such a Virtual Agent, the Customer Service Portal, and Engagement Messenger.

Related topics

Notify

Create an OpenFrame configuration

This configuration specifies the OpenFrame window settings as well as the URL to be launched within OpenFrame.

Before you begin

Role required: admin

About this task

As part of the OpenFrame configuration, users with the admin role can select one or more user groups. Access to the configuration is limited to the users that have the openframe user role and that belong to the selected groups.

Procedure

1. Navigate to **All** > **OpenFrame** > **Configurations** to display the OpenFrame Configurations list.
2. Click **New**.
3. Fill in the fields, as appropriate.

OpenFrame Configuration form

Field	Description
Name	The name of the OpenFrame configuration.
Title	The title that appears in the OpenFrame window header.
Subtitle	The subtitle that appears in the OpenFrame window header.
Order	The order number for the configuration. If users have multiple OpenFrame configurations, they can only access the configuration with the lowest order number. **Note:** When upgrading, the **Order** field for the existing default OpenFrame configuration is set to 1.
Enable collapsed view	Enables the expand and collapse capability for the OpenFrame window. When collapsed, users can still access call control actions. The default setting is **False**.

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Field	Description
Show presence indicator	Enables the indicator that displays agent availability.
User Group	The user groups selected for this configuration. Access to this configuration is limited to the users that have the openframe user role and that belong to the selected groups. **Note:** If you do not select any groups, the configuration is available to all users with the openframe user role.
URL	The URL to be launched within OpenFrame. This URL can be an absolute path or a path that is relative to the ServiceNow instance.
Active	Denotes this configuration as active.
Width	The width of the OpenFrame window.
Height	The height of the OpenFrame window, not including the OpenFrame header height.
Icon Class	The class of icons used for the OpenFrame window (retina-icons.css). Only supports icon-phone and icon-video values.
Title Icon	The icon displayed on the OpenFrame window header.
Configuration	Can be used to store any JSON encoded string.

Note: Several fields on the OpenFrame Configuration form can also be set by using the OpenFrame API. These fields include: **Title**, **Subtitle**, **Width**, **Height**, and **Title Icon**.

4. Click **Submit**.

Related topics

openFrameAPI - Client

OpenFrame events for work items, agent presence, and interactions

Use OpenFrame events to achieve better integration between Advanced Work Assignment (AWA) and Computer telephony integration (CTI) and aide in improved call routing.

OpenFrame events are enabled by default when your administrator installs the Openframe plugin (com.sn_openframe) and Advanced Work Assignment for CSM plugin (com.sn_csm.awa).

Note: The Advanced Work Assignment for CSM (com.sn_csm.awa) plugin is automatically installed with the Case Management Core plugin (com.sn_customerservice).

As a CTI developer, ensure that you subscribe to the following events by using the subscribe method of the openFrameAPI. For more information, see openFrameAPI - Client.

OpenFrame events

Event	Description
openframe_awa_agent_presence	Events are sent to OpenFrame when an agent's presence state changes.

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OpenFrame events (continued)

Event	Description
openframe_awa_workitem_offered	Events are sent to OpenFrame when a work item is offered to an agent.
openframe_awa_workitem_accepted	Events are sent to OpenFrame when a work item is accepted by an agent.
openframe_awa_workitem_rejected	Events are sent to OpenFrame when a work item is rejected by an agent.
openframe_agent_off_interaction	Events are sent to OpenFrame indicating the presence of an agent on chat as off or available.

Add and activate an OpenFrame configuration by navigating to **OpenFrame** > **Configurations**. For more information, see Create an OpenFrame configuration.

Sample payloads

Refer to the sample payloads for each event as described in the following table.

Events and their sample payloads

Event	Sample payload

openframe_awa_agent_presence	{
	"result":{
	"presence":{
	"name":"Available",
	
	"sys_id":"0b10223c57a313005baaaa65ef94f970",
	"available":true,
	"channels":[
	{
	"name":"Case",
	"available":true,
	
	"sys_id":"d4a675e3739713004a905ee515f6a7e7",
	
	"restrict_update":false
	},
	{
	"name":"Phone",
	"available":true,
	
	"sys_id":"f6281cc39335330090813a53177ffb32",
	
	"restrict_update":false
	},
	{
	"name":"Chat",
	"available":true,

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Events and their sample payloads (continued)

Event	Sample payload
	"sys_id":"27f675e3739713004a905ee515f6a7c3", "restrict_update":false }] } } }

openframe_awa_workitem_offered	{
	"result": {
	"workItem": {
	"sys_id": "14c86c40a1650610f87701807d9bc0be",
	"size": 1,
	"serviceChannel": {
	"name": "Chat",
	"sys_id": "27f675e3739713004a905ee515f6a7c3"
	},
	"document": {
	"sys_id": "aa582040a1650610f87701807d9bc076",
	"table": "interaction"
	},
	"previousWorkItem": "7c78a440a1650610f87701807d9bc02b",
	"isQueueTransferred": true,
	"isAutoAccepted": true
	}
	}
	}

openframe_awa_workitem_accepted	{
	"result": {
	"workItem": {
	"sys_id": "14c86c40a1650610f87701807d9bc0be",
	"size": 1,
	"serviceChannel": {
	"name": "Chat",

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Events and their sample payloads (continued)

Event	Sample payload
	"sys_id": "27f675e3739713004a905ee515f6a7c3" }, "document": { "sys_id": "aa582040a1650610f87701807d9bc076", "table": "interaction" }, "previousWorkItem": "7c78a440a1650610f87701807d9bc02b", "isQueueTransferred": true, "isAutoAccepted": true } } }
openframe_awa_workitem_rejected	{ "payload":{ "workItem":{ "sys_id":"66c4071d1bf66410b8e3ea06624bcb59", "size":1, "serviceChannel":{ "name":"Case", "sys_id":"d4a675e3739713004a905ee515f6a7e7" }, "document":{ "sys_id":"b6a4c31d1bf66410b8e3ea06624bcb93", "table":"sn_customerservice_case" }, "rejection":{ "reason":"Not my expertise", "sys_id":"31e3fa29b38023002e7b6e5f26a8dc17" } } } }

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Events and their sample payloads (continued)

Event	Sample payload
openframe_agent_off_interaction	{ "result":{ "interaction":{ "sys_id":"da1dc9651bbe6410b8e3ea06624bcb51", "number":"IMS0000050", "type":"chat", "reason":"INTERACTION_INACTIVE" } } }

Related topics

OpenFrame overview

Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations

Implement prebuilt, certified integrations with Contact Center as a Service (CCaaS) providers using the ServiceNow® voice reference architecture.

About this task

The Interaction Controls Component (ICC) feature enables CCaaS providers to display native voice and callback integrations so agents can manage customer calls directly from their configurable workspace.

For more information, see Interaction Controls Component (ICC) for voice calls and Integrating contact centers with Interaction Controls Component (ICC) for callbacks.

The voice controls and callback controls display under the following conditions:

- When the interaction is a phone call, voice controls display. When the interaction is a phone call that is associated with a callback task, the callback controls display.
- The **Enable interaction controls** field is enabled on the OpenFrame Configuration record that allows the admin to configure the Agent Workspace to display voice interaction components.
- The agent is a member of the user group specified on the OpenFrame Configuration record. If no user group is specified, all agents can access the CSM voice interaction record page.
- Ensure the certified third-party App Store plugin is installed. For Example:
  - Unified Experience from Genesys
  - Unified Experience from Genesys - Core

Before you begin

Ensure the Interaction Controls Component (ICC) plugin (com.app_interaction_control) is installed to use the ICC voice features for CCaaS.

Role required: admin

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Procedure

1. Navigate to **All** > **OpenFrame** > **Configurations**.
2. Create a new configuration record for the specific CCaaS provider.
   Some CCaaS providers can include OpenFrame configurations for their plugin.
3. Turn on the interaction controls for OpenFrame by selecting the **Enable interaction controls** check box.
4. From the **User Group** column, select a group and move it to the selected column.
   This is the group of users to whom the OpenFrame configuration applies.
5. Unlock the URL field.
6. In the URL field, enter a third-party URL.
   CaaS providers have specific configuration requirements for their plugins. Refer to the relevant contact center documentation for setup instructions.
7. Select **Update**.

What to do next

Refer to Plugin requirements for voice and callback integrations with contact centers for dependencies and address all prerequisite requirements to access the ICC features.

Plugin requirements for voice and callback integrations with contact centers

For the Interaction Controls Component (ICC) call features to work, you must have a combination of plugins that can be downloaded from the ServiceNow® Store and CCaaS providers.

The CCaaS providers must integrate with the ServiceNow platform. Additionally, they must submit their plugin for certification, to be made available for use from the ServiceNow® Store.

Note: Verify plugin dependencies against the store listing to ensure you're using the latest compatible versions.

The following plugins are required to deploy the call control integration with the contact center platform:

- Interaction Controls Component (ICC) (sn_int_control)

  The following plugin and app dependencies are installed as part of the ICC plugin:

  Plugin dependency:

  - Glide Conversation Server (com.glide.cs)
  - Glide Conversation Server Custom Adapter (com.glide.cs.custom.adapter)
  - Appointment Booking (com.snc.appointment_booking) is required for callback integrations.
  - Openframe (com.sn_openframe)

  App dependency:

  - External Agent Management Util Pack (sn_external_agent)
  - Contact Center Integration Core (sn_ct_ctr_it_core)
  - Omnichannel Callback (sn_omni_callback)
  - OpenFrame (sn_openframe)
- Advanced Work Assignment

  The External Routing Support plugin is required for callback integration with contact centers.

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- Customer Service Management (CSM)
- Agent Workspace, as well as any workspace that works with Agent Chat, Email Interaction, or Messages.
- Products with Contact Center Integration Core Plugin
  - Application Spoke Selector
  - External Agent Management Util Pack

Note: Address the Contact Center Integration Core plugin dependencies prior to downloading the plugin.

In addition to the preceding requirements, Install Omnichannel Callback for Customer Service Management for callback integration with contact centers.

Set default workspace for CCaaS

Configure and set a default workspace for contact center agents to let them navigate back to a workspace integrated with Interaction Controls Component (ICC), from any other unsupported workspace.

Before you begin

An interaction can be opened and details displayed in any workspace within the ServiceNow instance. However, if the workspace isn't integrated with ICC, then the global call controls supported by the ICC integration doesn't display in the workspace, rendering the workspace as unsupported.

Promote the Interaction Controls Component (ICC) plugin (com.app_interaction_control) is installed to use the ICC voice features for CCaaS.

Role required: **admin**

Configure the default workspace via OpenFrame within your ServiceNow instance as follows.

Procedure

1. Navigate to **All** > **OpenFrame** > **Configurations**.
2. Create a configuration record for the specific CCaaS provider.
   Some CCaaS providers can include OpenFrame configurations for their plugin.
3. Turn on the interaction controls for OpenFrame by selecting the **Enable interaction controls** check box.
4. Checking the **Enable interaction controls** check box displays the **Default Experience** field.
5. Click the Search icon to search through the list of available supported workspaces and select the workspace you want to set as default.
6. From the **User Group** column, select a group and move it to the selected column.
   This user group refers to the group of users to whom the OpenFrame configuration applies.
7. Unlock the URL field.
8. In the URL field, enter a third-party URL.
   CaaS providers have specific configuration requirements for their plugins. Refer to the relevant contact center documentation for setup instructions.
9. Select **Update**.

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Use Voice call widget for portal communication

The voice call widget enables users to manage voice calls initiated from the portal interface or Engagement Messenger. The widget maintains call state across tabs and page navigation, displaying call controls and connection status.

WebRTC (Web Real-Time Communication) enables voice communication directly between browsers. When integrated into ServiceNow, it allows users to initiate calls from portal pages or Engagement Messenger. Users can make calls without switching applications or relying on external communication platforms.

The voice call widget appears at the bottom-left corner of the page when a call is initiated.

Enable WebRTC for voice calls

To enable the voice call capability on ServiceNow, first create an AI voice assistant to enable natural, conversational voice interactions between users and AI voice agents. For configuration steps, see Create an AI voice assistant.

Note: The WebRTC application includes out-of-box configurations for client-side WebRTC calling. While manual configuration is optional, the provided setup eliminates the need for additional customization.

Select the **Web Real-Time Communication (WebRTC)** tab to connect the voice assistant to mobile, web, and external applications.

1. Select **Web applications**.
2. Follow the on-screen instructions to configure WebRTC for ServiceNow Portal or Engagement Messenger. For detailed configuration steps, see Create an AI voice assistant.

Contact your administrator for help configuring and enabling the voice call widget on your selected web application.

Customer support using voice call widget workflow

The following workflow shows an interaction between the Portal user and the AI Voice agent.

Sarah, an e-commerce customer, needs help while completing an activity in the portal, such as reviewing product information or managing items in a shopping cart. Sarah starts a call from the voice call widget, and the system connects Sarah to an AI Voice agent that provides support. During the call, Sarah can continue moving through the portal, and the active session remains connected until the issue is resolved.

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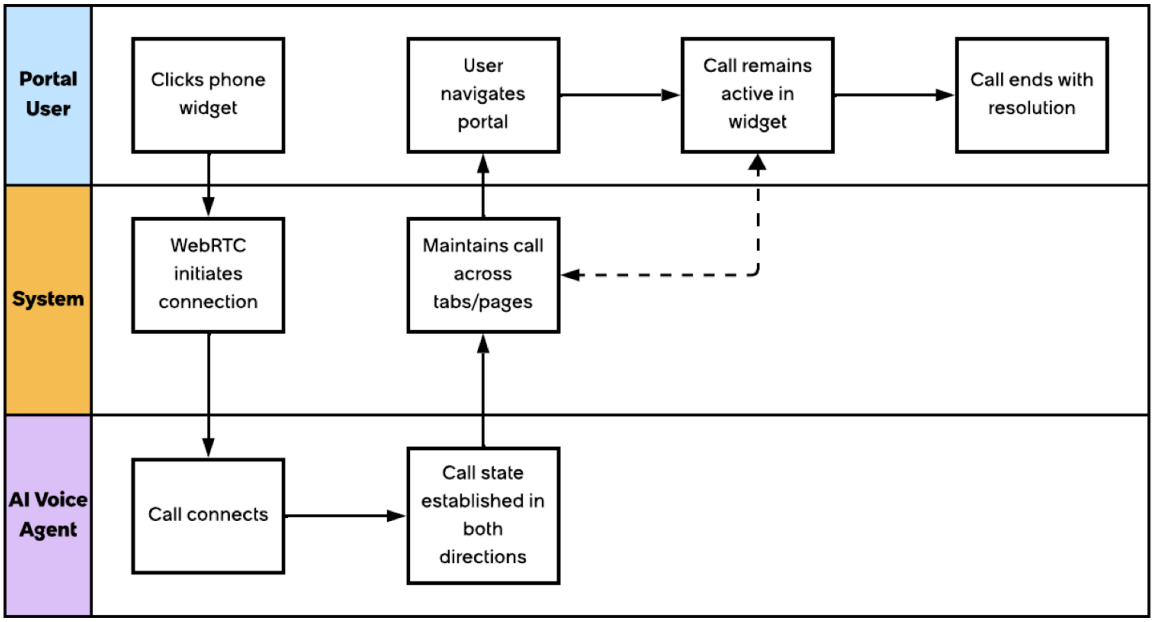

The voice call widget includes the following key capabilities:

Voice call widget features

Feature	Web applications	Behavior and use case
Call timer	• ServiceNow Portal • Engagement Messenger	Elapsed time during an active call so users can track call duration.
Mute audio control	• ServiceNow Portal • Engagement Messenger	Mute or unmute audio during an active call to manage background noise. If mute fails, the widget displays an alert.
End call control	• ServiceNow Portal • Engagement Messenger	End the current call from the widget. If the call cannot be ended, the widget displays an alert.
Call state indicators	• ServiceNow Portal • Engagement Messenger	Current call state, such as connecting, connected, or connection failed, so users can understand call status and retry when needed.
Cross-tab persistence	ServiceNow Portal	Call state across multiple browser tabs. If the portal is opened in a second tab, an alert indicates that the call is active elsewhere and helps prevent duplicate calls.

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Voice call widget features (continued)

Feature	Web applications	Behavior and use case
Page navigation persistence	ServiceNow Portal	Active calls remain connected when users navigate between portal pages. **Note:** Refreshing the page or reloading WebRTC application disrupts the connectivity.

Configuring Omnichannel Callback for Customer Service Management

Configure various aspects of Omnichannel Callback for Customer Service Management to enable callback feature based on the specific requirements of your organization.

Installing and configuring Omnichannel Callback for Customer Service Management enables your customers to request a callback from various channels such a Virtual Agent, the Customer Service Portal, and Engagement Messenger.

The configuration process consists of the configuration tasks listed in the following table.

Configuration tasks

Task	Description
Install Omnichannel Callback for Customer Service Management	Install the Omnichannel Callback application (sn_callback).
Configure the callback behavior for Omnichannel Callback for Customer Service Management	Configure the various aspects of callback such as max retry attempts and expire time.
Publish the Virtual Agent topics for callback	Publish the callback virtual agent topics to display the callback option to customers on Virtual Agent clients.
Callback feature configuration form	Configure the callback feature in Engagement Messenger.

Omnichannel Callback for Customer Service Management

Omnichannel Callback for Customer Service Management enables a callback option to be provided for customers when there is a long wait time for a live agent.

Omnichannel Callback for Customer Service Management offers an option for customer service agents to call customers back when the wait time for agents is long or agents are unavailable. For more information, see Omnichannel Callback.

Install Omnichannel Callback for Customer Service Management

You can install the Omnichannel Callback for Customer Service Management application (sn_callback) if you have the admin role.

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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.
- Review the Omnichannel Callback for Customer Service Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with the Omnichannel Callback for Customer Service Management application:

- Plugins
- Store applications
- Scheduled jobs - Send reminder for scheduled Callback tasks

Procedure

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

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Related topics

Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations

Plugin requirements for voice and callback integrations with contact centers

Publish the Virtual Agent topics for callback

Publish the Virtual Agent topics for callback to help your customers request a callback from agents when there's a long wait time to reach a live agent or agents are unavailable.

Before you begin

Ensure that the Conversational appointment booking application is installed.

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Role required: virtual_agent_admin or admin

About this task

Deploy the inactive topic to save it and make it available to users on Virtual Agent clients.

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistant Designer**.
2. Select the **Asset library** tab.
3. In the Asset library, publish the following topics.
   - Request a callback
   - Reschedule a callback
   - Cancel a callback
4. In the Header bar for the topic, select **Publish**.

   If you're using NLU discovery, the Choose what to publish dialog box appears. Select the available items to publish with the topic, such as the NLU model and language mappings, and then click **Publish**.

   Note: If the **Publish Model** option is unavailable, the model may need some work. For example, the model may not have enough intents or may need more utterances for some intents. Fix these issues before proceeding. Also, if a model language is unavailable, the language-specific model has never been published. Publish it from NLU Workbench. For more information, see Model management.

   For topics, the topic state is Active and the Published state changes to **just now**.

5. If you published a conversation topic, verify that your keywords or NLU utterances for the topic work as expected.

   a. Return to the Topics page, and then click **Test Active Topics**.

   b. In the conversation window, enter keywords or NLU utterances that correspond to the topic intent to verify that the topic opens.
   For the pre-built Virtual Agent topics, the bot returns a list of topics that match the entered keyword or utterance.

Result

The topics are published and are available for use in calling topics.

Configure the callback behavior for Omnichannel Callback for Customer Service Management

such as enabling agent-scheduled callbacks, setting the maximum number of retry attempts or defining the expiration time, in Omnichannel Callback for Customer Service Management.

Before you begin

Role required: admin

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. In the **Name** search field, enter `sn_callback`.
3. Configure any of the properties listed in the following table.

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Callback properties field description

Property	Default value	Description
sn_callback.callback_expire_time	60	Callback timeout in minutes after which the callback task is closed.
sn_callback.callback_max_retry_attempts	5	Maximum retry attempts after which the callback task is closed.
sn_callback.enable_scheduled_callback	true	Option to enable scheduled callbacks by enabling customers to select a time slot for callback.
sn_callback.enable_agent_scheduled_callback	Boolean	Enable the agent-scheduled callback feature. When enabled, agents can schedule callbacks on behalf of customers from CSM/ FSM Configurable Workspace.

Social media integration

Support case resolution through social media communication channels.

When working with customers or consumers to create and resolve cases, agents can select **Social** as the communication channel and add a social profile to the Case form. Any communication with customers or consumers that takes place through social media is recorded on the Case form in the **Social Logs** related list.

Customer service managers can create one or more social profiles for a user by recording a user's social profile information on a specific social media channel such as Twitter or Facebook. Managers can create social profiles for accounts, contacts, and consumers from the **Social Profiles** related list on the entity form. Agents have read-only access to these profiles.

Integration with Customer Service Management

The social media communication channel is integrated with the following Customer Service Management forms: Case, Account, Contact, and Consumer.

On the Case form, the **Channel** field includes the **Social** option. Selecting this option adds the **Social Profile** field to the Case form, in which you can select a specific social media channel. The **Social Logs** related list captures the details of social media conversations.

The Account, Contact, and Consumer forms include the **Social Profiles** related list. Customer service managers can create one or more profiles for each of these entities.

Plugins

The Customer Service Social Integration plugin (com.sn_cs_social) is activated as part of the Customer Service Management plugin.

Tables

The Customer Service Social Media plugin adds the following tables.

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Customer Service Management Social media plugins

Table	Description
Social Channels (sn_app_cs_social_social_channel)	Stores the social channels, which are brought in by the social integration tool.
Social Profiles (sn_app_cs_social_social_profile)	Stores the social profiles created for each customer contact or consumer.
Social Logs (sn_app_cs_social_social_log)	Stores the details of social media conversations related to cases.
Customer Service integration with Social Media Store (sn_cs_social_host)	The Customer Service integration with Social Media app allows agents to select Social as the communication channel and add a social profile to the Case form. Any communication with customers or consumers that takes place through social media is recorded on the Case form in the Social Logs related list.

Implement Intelligence

Integrate intelligence features to automate routine tasks and provide relevant content, enabling a quicker, more personalized customer experience.

Recommended Actions

Set up recommended actions and field recommendations to help agents resolve cases effectively and efficiently.

Machine learning

Utilize machine learning solutions to analyze and classify cases and automate tasks.

Now Assist for Customer Service Management (CSM)

Use Now Assist for CSM to enhance user productivity and efficiency through conversation and proactive experiences using generative AI.

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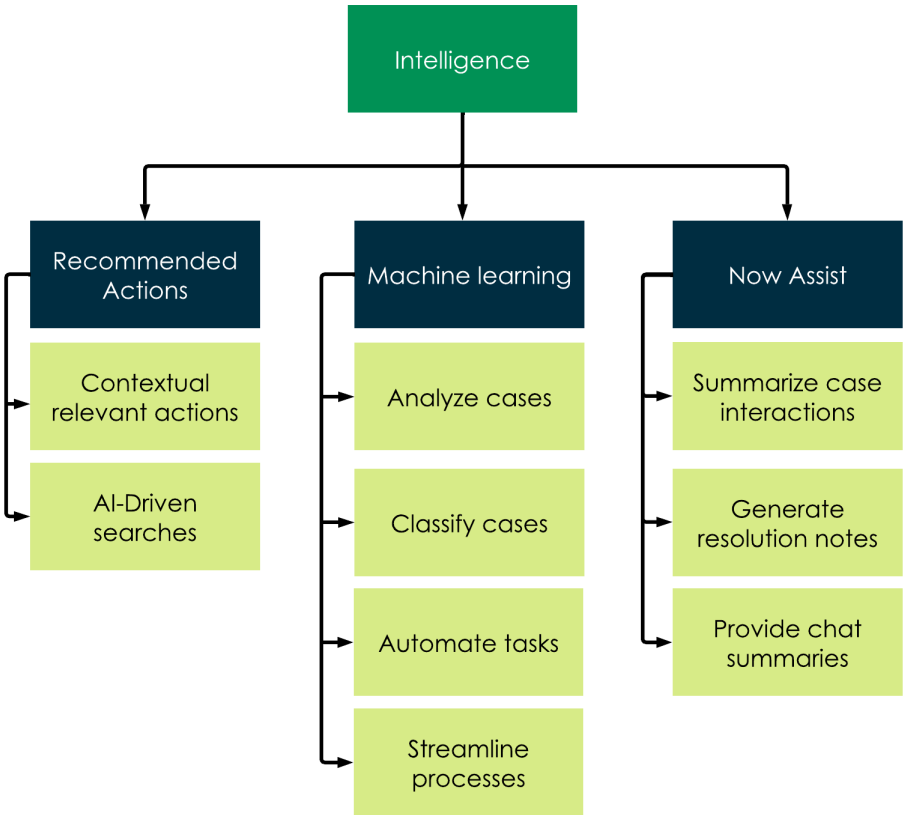
Implement intelligence overview



Recommended Actions

Set up recommended actions and field recommendations to resolve cases more effectively. The Recommended Actions application displays relevant actions based on the context of a record and enables you to perform AI-driven searches for pertinent resources. This functionality helps you quickly access and act on the most relevant information, enhancing your efficiency in addressing customer issues.

Machine learning

Use machine learning solutions in Customer Service Management to handle case creation, assignment, and resolution. Implement these solutions to analyze and classify cases, automate tasks, and streamline processes.

Now Assist for Customer Service Management

Use the ServiceNow Otto for Customer Service Management (CSM) to boost productivity and efficiency with generative AI. This tool enhances user interactions by summarizing case information, generating resolution notes, and providing chat summaries. It also helps you quickly understand chat and case context, enabling faster and more accurate customer resolutions.

Configuring Recommended Actions

Use the Recommended Actions application to display relevant actions to agents based on a context of a record or enable agents to perform an AI search to find relevant resources. Agents can quickly and easily take action to help customers and resolve their issues.

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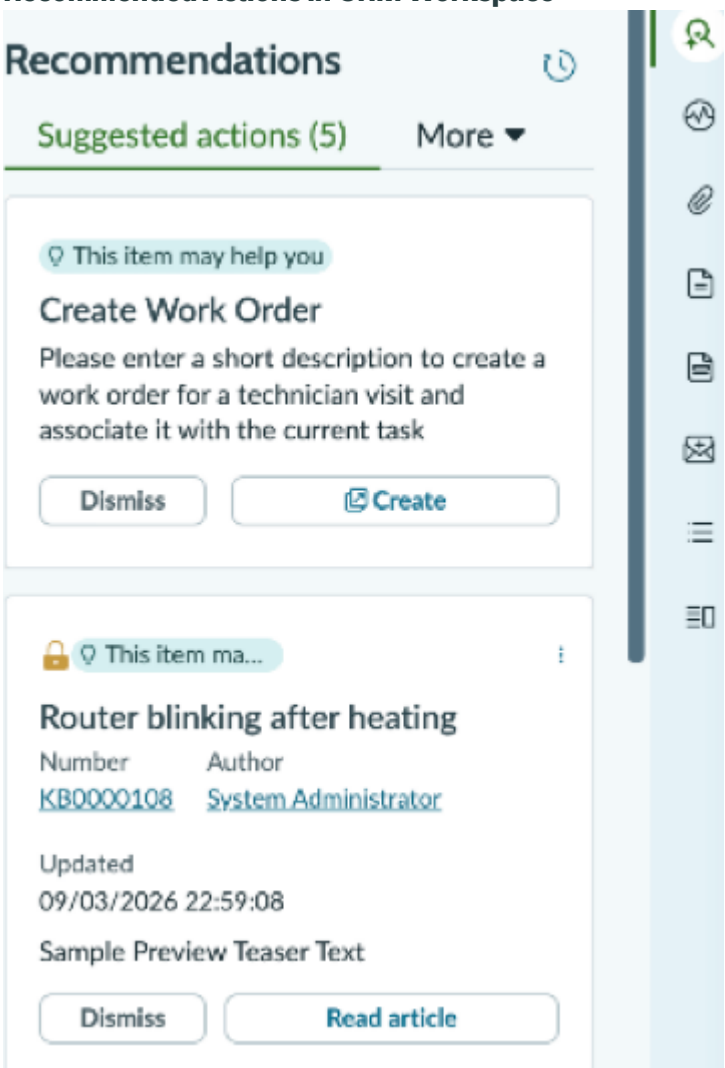
Recommended Actions in CRM Workspace



With Recommended Actions:

- Provide agents with optimal action in a context of a record.
- Enable agents to focus their attention to the critical call-to-action.
- Allow agents to take an action in a contextual side panel or in a subtab.
- Enable agents to troubleshoot and provide a resolution to customers.
- Rank actions that agents can take based on a configurable logic.
- Recommend a value for a field on a form.
- Enable agents to use AI search to find the most relevant resources.

Example scenarios for implementing Recommended Actions

Use Recommended Actions to provide the following recommendations:

- Apply resolution from a solved case: Recommend agents to apply resolution from a similar solved case and then close the case.
- Reassign case: Recommend a field value for the Assignment group field so that the case is assigned to the relevant team.

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- View and attach article: Recommend a Knowledge article relevant to the customer issue so that agents can view and attach the article to the current case.
- Review a refund request. Recommend a decision tree for agents to work through to determine if the customer is eligible for a refund.

For end-to-end configurations of Recommended Actions for specific scenarios, see Example configurations of recommended actions.

Action types for Recommended Actions

With the Recommended Actions application, you can create the following types of actions for agents to take. For more information, see Recommended Actions.

Action type	Description
Guidance	An action that an agent can take or information they can share. For example, guidance can recommend that an agent can attach a knowledge article in comment, work note, or mail of a case or create a work order.
Guided decision tree	A guided flow to follow. A decision tree is a multi-step process that includes a series of questions and answers and results in guidance.
Field recommendation	A recommended value to use for a field. For example, this type of action can recommend the assignment group based on the text in the case short description.

AI search

Agents can enter their queries in the search bar to access AI-powered search results. The most relevant answers for the search query appear as genius result cards. Agents can take the actions from the search cards directly to resolve an issue. For more information, see AI search in Recommended Actions.

Benefits of AI search integration with Recommended Actions

- Unified search and recommendations: This integration combines AI-driven search capabilities with proactive recommendations, providing a unified toolset for agents.
- Contextual intelligence: The system leverages contextual data to deliver highly relevant search results and recommendations tailored to each case.
- Proactive recommendations: Agents receive actionable suggestions to accelerate case resolution, based on real-time case context.
- Seamless workflow: The integration streamlines the user workflow by providing access to search and recommendations within a single interface.

Using Recommended Actions

Agents can access recommended actions in a workspace such as CRM Workspace by selecting the Recommended Actions icon ( ) in the contextual side panel. For more information, see Using the Recommended Actions application.

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Setting up Recommended Actions

Set up the Recommended Actions application so that you can create actions of type guidance or field recommendation. An admin can complete the following setup tasks.

Steps to set up the Recommended Actions application

Setup task	Description
Install the Recommended Actions application	Download the Recommended Actions application from the ServiceNow® Store.
Assign roles to Recommended Actions users	Assign roles to your users to control access to Recommended Actions features and information.
Configuring the Recommended Actions application	Configure recommended actions to create a context, rule, and recommendations with action types such as guidance and field recommendation. **Note:** The Guided Decisions application (sn_gd_core) is required to create guided decision trees.

Note: If Recommended Actions doesn't appear on a variant of a record page (such as the CSM default record page, CSM Interaction record page, or Front-line case page), ensure that the variant is marked active. For detailed steps, see Recommended Actions tab not appearing on the CSM default record page.

Integrating decision trees in Recommended Actions

Optionally, set up the Guided Decisions Experience application so that you can create decision trees and then integrate them in recommended actions. Admins can complete the following setup tasks.

Steps to integrate decision trees in Recommended Actions

Setup task	Description
Install the Guided Decisions Experience application	Install the Guided Decisions Experience application from the ServiceNow® Store. This application enables you to configure decision trees that you can use as recommendations.
Configuring decision trees	Configure decision trees that agents can use to troubleshoot solutions for customer issues.
Add Guided Decisions to Recommended Actions	Add decision trees to recommended actions, so that agents can take relevant action during troubleshooting based on a record context.

Request apps 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.

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Recommended Actions

Use Recommended Actions to display relevant actions to agents based on a context of a record or recommend a value for a field.

Action types in Recommended Actions

Action type	Description	Use cases
Guidance	A guidance is an action that an agent can take or information that an agent can share. • Guidances appear as cards in the contextual side panel in a workspace. • Agents can access these cards by selecting the Recommended Actions icon in the side panel. • Agents can perform the action by selecting the button on the card.	• Mary created a case to report an issue with a router. The agent assigned to this case is recommended to apply a resolution from a solved case to resolve the customer issue. The resolution notes and a resolution code from the solved case are copied into the Closure Information section of the current case. • Paul, who has an account with StellarVest bank created a case to report a loss of credit card. The agent assigned to this case is recommended to create a work order to dispatch a new credit card for Paul.
Field recommendation	A field recommendation is a value that is recommended for a field. Depending on the configuration, the recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field values are shown as messages only underneath the fields for the existing records. • You can configure the fields with the text and values that appear in the messages. • You can also configure a confidence threshold to auto-fill a recommended value. • You can configure a preference to auto-fill a recommended value.	• An agent wants to reassign the case to a different team who is better equipped to resolve a customer issue. A field recommendation can recommend the assignment group based on the text in the case short description. • While interacting with a customer, an agent creates a case on behalf of the customer. Based on the short description the agent enters in the case form, the values for the fields **Product**, **Assignment group**, and **Assigned to** are recommended to the agent.
Decision tree	A decision tree is a guided flow for agents to follow. A decision tree is a multi-step process that asks a series of questions. Based on the answers that an agent enters, a guidance is provided.	Rina created a case to report that their phone isn't charging. The agent assigned to the case is recommended to use a decision tree that asks a series

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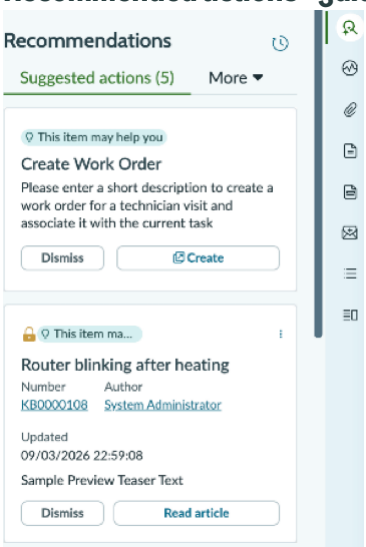
Action type	Description	Use cases
	Note: The Guided Decisions application (sn_gd_core) is required to create decision trees.	of questions to troubleshoot the issue with the phone and provides a guidance in the end.
Playbook	A playbook is an interactive, step-by-step guided workflow that helps agents make decisions and resolve issues. Playbooks appear as action cards in the Recommended Actions panel. Agents can launch and execute a playbook inline without switching applications. For more information, see Playbooks in Recommended Actions.	An agent handling a complex billing dispute is recommended a playbook that walks through verification steps, escalation options, and resolution actions in the Recommended Actions panel.

Actions of the type **Guidance**, **Guided Decision Tree**, and **Playbook** are displayed as cards within the contextual side panel.

Recommended actions - guidance card



Actions of the type **Field Recommendation** are auto-filled in the fields or appear as messages under the fields on a record form. Agents can follow the recommendations and select these field values.

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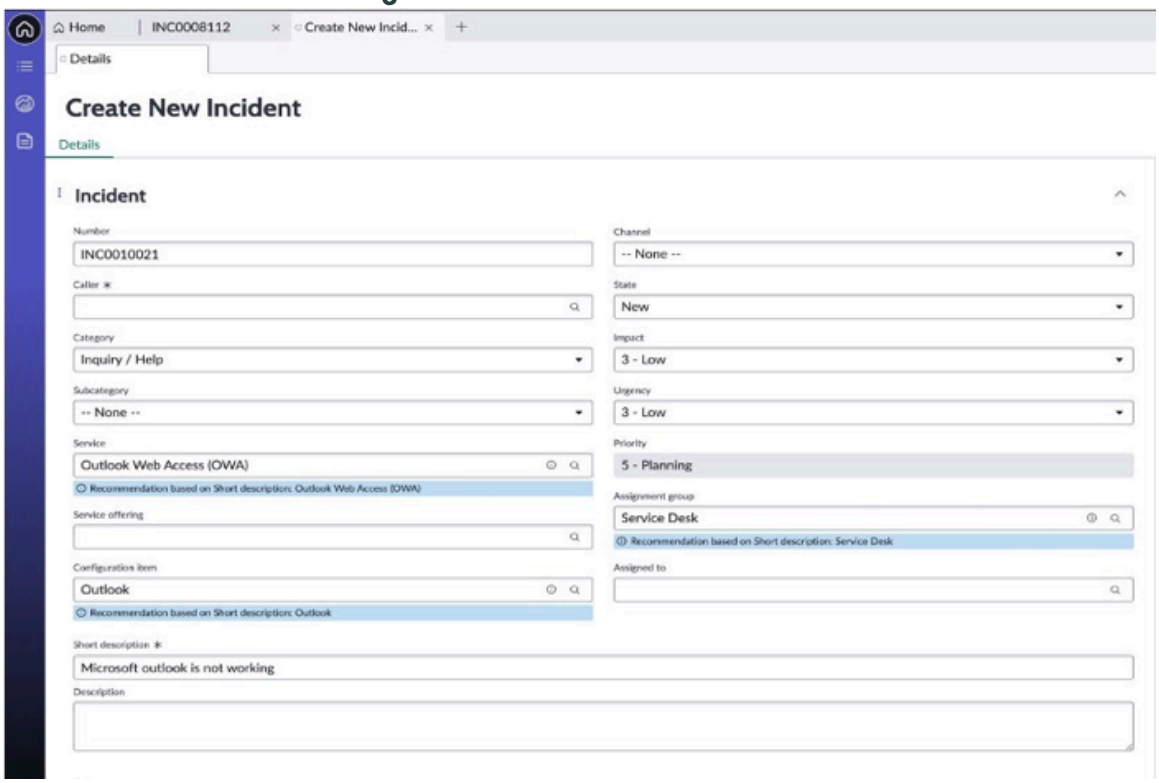
Field recommendation messages in the Incident form



For more information, see Creating guidance and field recommendation in Recommended Actions.

Elements for configuring recommended actions

Configuring a recommended action is a multi-step process that involves:

Context

A context enables agents to see recommended actions for a record in that table when certain rules are met. For more information, see Contexts in Recommended Actions.

Context input

A context input enables you to utilize the entities other than the context table to define rules, recommendations, and resource generators so that recommendations are updated dynamically as the context changes. For more information, see Context inputs in Recommended Actions.

Rule

A rule is a set of conditions that applies to a context and determines when a recommended action appears for records in the context table. For more information, see Rules in Recommended Actions.

Recommendation

A recommendation is a way to suggest an action to an agent. You can create recommendations with action types of guidance, field recommendation, and playbook. For more information, see Recommendations in Recommended Actions.

Resource generator

Resource generators provide helpful information for guidance and field recommendations. The resource generators use decision table, flow, scripts, Predictive Intelligence framework, or AI search capabilities to generate resources.

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For example, a resource generator can provide a knowledge article link that can then be used as a recommended action for a case. For more information, see Resource generators in Recommended Actions.

Arbitration parameter

Arbitration parameters determine the frequency of issues or the priority order of the recommended actions so that agents get the guidance that they must help resolve customer issues.

Contexts in Recommended Actions

A context enables agents to see recommendations for records from a table when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.

Contexts are created for tables, such as the Case [sn_customerservice_case] table or the Incident [incident] table. Creating a context includes the following steps:

- Selecting a table.
- Creating Context inputs. A context input enables you to utilize the entities other than the context table to define rules, recommendations, and resource generators.

  Note: Creating context inputs is not mandatory.

- Creating rules for the context. A rule shows recommendations to agents with certain roles for records that meet certain conditions.
- Creating recommendations for the rules. A recommendation is a way to suggest a helpful action to an agent.

The Recommended Actions application includes a context record, Case Context, that you can use to create recommendations for cases.

The Recommended Actions application supports multiple context records per table, enabling users to create different experiences based on criteria such as user attributes or domains.

The Recommended Actions component can be configured in UI Builder to use the active context record. The recommendations and AI Search results adjust dynamically according to the configured active context.

Context form

You can access context records by navigating to **All** > **Recommended Actions** > **Contexts**. The Contexts list displays a brief description of each context and the table that the context applies to.

The Context form includes the name and description of the context, the selected table, parent context, and a search application configuration for AI search. When you create a context, provide this information and save the record. After saving, the Context form displays the following related lists.

- **Rules**: Displays the rules that have been created for the context, including the selected user roles. You can create a rule only from the Rules related list on the Context form. For more information on rules, see Rules in Recommended Actions.
- **Recommendations**: Displays the recommendations associated with the context rules, including the action type and action. You can create a recommendation only from the Recommendation related list on the Rule form. For more information on the recommendations, see Recommendations in Recommended Actions.

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- **Search result mapping**: Displays mappings between AI search outputs and Recommended Actions inputs.
- **Inherited rules**: Displays the rules inherited from the parent context. The Inherited rules related list appears only for the contexts that have the parent context assigned. For more information on how the parent context rules are inherited by the child context, see Apply rules to tables extended from the context table.
- **Extended contexts**: Displays all the contexts which use the current context as a parent context. This related list appears only for the parent contexts.
- **Context Inputs**: Displays all the context inputs which can be used in defining rules, recommendations, and resource generators. This related list appears only when a parent context is not defined.

The Contexts list includes an Active column. You can use this column to view and set the Active value for a context record. The Context form includes an **Active** field that you can use to activate or deactivate a context record.

Synchronous and asynchronous modes of evaluation for Recommended Actions

As an admin, you can configure the loading behavior at the context level for Recommended Actions, by choosing between synchronous and asynchronous modes. In synchronous mode, recommendations are loaded before the page becomes interactive, ensuring a complete view is available before any action is taken. In asynchronous mode, recommendations load in the background without blocking the user interface, allowing agents to start interacting with the record immediately. Each mode is tailored to meet different performance and user experience requirements.

The **Asynchronous Evaluation** check box in the Context form, when selected enables the agents to make updates and perform actions on the case or incident record while the recommendations load on the contextual side panel. By selecting this field, an admin or RA author can enable asynchronous processing for recommended actions.

The `sn_nb_action.async_ra_timeout` system property specifies the timeout duration (in seconds) for an asynchronous process to generate the recommendations. This value serves as a guideline for managing execution time and preventing excessive delays. The default value is set to 30 seconds, and the maximum value can be 180 seconds. If the generation of recommended actions takes more than 30 seconds, the **Retry** button on the contextual side panel appears. The retry process starts in synchronous mode - it runs directly during user interaction instead of processing asynchronously.

Inheriting the rules and recommendations from hierarchical contexts

The Parent context field appears only when the table selected in the Table field has one or more parent tables for which context is defined. Using the Parent context field, you can import it's active rules and recommendations into the extended context. When you select the search icon in Parent context field, the list of contexts of parent tables is displayed. You can select any one parent context from the list. The rules that are inherited appear in the Inherited Rules related list. For more information on how to configure rules so that the recommendations are inherited by the extended context, see Apply rules to tables extended from the context table.

Note:

- If you configure context inputs for a context, you cannot add a parent context. To add a parent context, you must delete the already existing context inputs.
- When a parent context is defined, the Context inputs related list does not appear.

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For more information on how context inputs limit the inheritance of the parent context's rules and recommendations, see Context Input configuration limitations.

Example: Inheriting the rules and recommendations from hierarchical contexts

Consider the following tables and their contexts, rules, and recommendations. Table 1 is the parent table for Table 2 and Table 3. Table 3 is the parent table for Table 4. Table 2 is the parent table for Table 5.

Tables and their contexts

Table	Context	Rule	Recommendation
Table 1	Context 1 (Active)	Rule 1 (Active)	Recommendation 1
Table 2	Context 2 (Inactive)	Rule 2 (Inactive)	Recommendation 2A and Recommendation 2B
Table 3	Context 3 (Active)	Rule 3 (Active)	Recommendation 3
Table 4	Context 4 (Active)	Rule 4 (Active)	Recommendation 4
Table 5	Context 5 (Active)	Rule 5 (Active)	Recommendation 5

In the Context form:

- Scenario 1: When you add Context 3 in the Parent context field of Context 4, the Rule 3 and Recommendation 3 are inherited by Context 4.
- Scenario 2: When you add Context 2 in the Parent context field of Context 5, the Rule 2 and its recommendation 2A and 2B aren't inherited by Context 5 as the Rule 2 is inactive.

Creating multiple context records for the same table

Starting with v14.0 of Recommended Actions, the *`Avoid duplicate active entry for context`* business rule allows the creation of more than one context per table. You can create more than one context for the same table. This enables you to configure precise recommendations for various types of records in the same table.

The following are use cases where you can create different contexts for the same table:

Use case 1: Different roles may interact with the same table but need tailored actions or views.

Consider the Interaction table. The same interaction data can be worked upon differently based on the user persona.

- Context A: Show field recommendations for resolution, or related change tasks/ catalog items, or standard knowledge articles for the IT Support Agent on the Interaction record page.
- Context B: Surface similar resolved case or relevant knowledge article recommendations for the Customer Service Support Agent on the Interaction record page.

Use case 2: Each context may use a different Predictive Intelligence model or AI model variant for recommendations.

Enables testing and adoption of ML models in parallel without conflict.

- Context A: Use similarity model for Recommended Actions.
- Context B: Use classification model for categorization or assignment.

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Use case 3: Users may access the same record through different channels—chat, email, voice, etc., requiring tailored recommendations.

Entry points provide different signals and user intent.

- Context A: When the case is created via Chat Agent, recommend and share the KB article in chat action.
- Context B: When the case is accessed via Phone Support, surface KB articles and enable sharing via SMS channel.

Configuring a context record for the Recommended Actions component

When configuring the Recommended Actions component in UI Builder, users with the Recommended Actions admin role (next_best_action_admin) can set a component input property to map the active context record to the component.

On the Config tab for the Recommended Actions component, enter the sys id of the active context record in the **Context Sys id** field. For more information about configuring UI Builder components, see Components documentation.

Note: If the **Context Sys id** field is empty, the system uses the latest context record for that entity to map to the Recommended Actions component.

Case Context record

The Recommended Actions for Customer Service application adds the Case Context record for the Case table [sn_customerservice_case]. This record is active by default (Active=true). For more information on the Case Context record, see Contexts in Recommended Actions for Service.

If an upgrade customer has one or more context records for the Case table available on their instance, the system runs a fix script that deactivates the out-of-box Case Context record (sets the **Active** field to false).

Note: Ensure that the correct context record for the Case table is active.

You can create contexts, rules, and recommendations for any table. However, on the CSM default record page, the Recommended Actions tab appears only for records from the base system Case [sn_customerservice_case] table. For more information, see Recommended Actions tab not appearing on the CSM default record page.

Related topics

Create a context in Recommended Actions

Create a rule in Recommended Actions

Create a recommendation in Recommended Actions

Rules in Recommended Actions

A rule is a set of conditions that applies to a context. A rule shows recommendations to agents with certain roles for records that meet certain conditions.

Creating a rule includes the following steps:

- Selecting the user roles that can see the recommendations associated with the rule.
- Defining the conditions that apply to the context records and context inputs.
- Creating recommendations for the rule. A recommendation is a way to suggest a helpful action to an agent. A rule can have multiple recommendations.

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The Recommended Actions application includes one context record, case context, that you can use to create recommendations for cases. For example, following are some guidance recommendations:

- Case field level recommendations: This rule includes one recommendation to predict a value for the **Assignment group** field on the Case form.
- Case side panel recommendations: This rule includes recommendations to view and attach a knowledge article to a case and to attach and add a link to a knowledge article in a comment, work note, or email.

Apply rules to tables extended from the context table

The rule created in the parent context are inherited by the extended context when you select the Apply to tables extended from the context table check box in a rule. The rules inherited from the parent context appear in the Inherited Rules related list of the extended context. Therefore, the recommendations of these rules are passed on to the extended context. Along with the recommendations of the context table, the recommendations of the active rules from the parent context are inherited by the extended context.

Rule form

The Rule form provides information about the rule, including a description, the selected user roles, and conditions that apply to the table in the associated context.

When you create a rule, provide this information and save the record. After saving, you can see the Recommendations related list.

You can access the rule records by navigating to **All** > **Recommended Actions** > **Rules**. New rules can only be created from within a context. For more information, see Create a rule.

Rule form fields

Field	Description
Name	The name of the rule.
Context	The context that this rule is associated with. This field is auto-populated from the Context form.
Roles	The user roles that can see recommendations for this rule.
Description	A brief description of the rule.
Advanced Condition	The conditions that apply to the records from the context table. If a context input is available for the context, you can build conditions on it along with the context table.
Fields affecting this rule	Fields from the context table that need to be monitored. Changes to these fields generate recommended actions of the type field recommendation for unsaved records.
Active	When enabled, the rule is active.

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Rule form fields (continued)

Field	Description
Apply to tables extended from the context table	When enabled, the rule is applied to tables that are extended from the context table.
Order	Determines the order in which the rule is applied.

Related topics

Create a rule in Recommended Actions

Recommendations in Recommended Actions

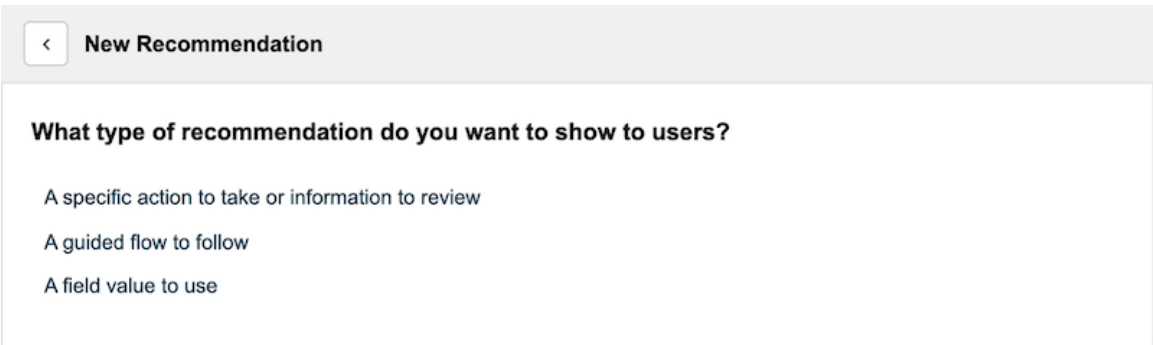
A recommendation is a way to suggest a helpful action to an agent. A recommendation includes the action and any relevant resources and inputs.

There are three types of recommendations that are provided to agents:

- **Guidance**: An action that an agent can take or information that they can share.
- **Decision tree**: A guided flow to troubleshoot an issue and provide a solution.
- **Field recommendation**: A recommended value to use for a field.
- **Playbooks**: A playbook to run for step-by-step resolution

Creating a recommendation

When you create a recommendation, you can select the type from the New Recommendation screen. This screen lists the available types.



Selecting a type on the New Recommendation screen takes you to the Recommendation form. The selected type is added to the **Action type** field on the Recommendation form.

Recommendation form

The Recommendation form provides information about a recommendation, including the selected action and any inputs and resource generators that the action requires.

When you create a recommendation, you select an action type and an action. The next steps depend on the action type that you select. For example, guidances and field recommendations require action inputs while decision trees don't.

When you create a recommendation, provide this information and save the record. After saving, you can see the Action inputs form section. Inputs are parameters that go into an action and enable agents to complete that action. You can select relevant inputs manually, from the context record, context inputs, or from the resource generator.

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You can access the recommendation records by navigating to **All** > **Recommended Actions** > **Recommendations**. New recommendations can be created only inside the rules. For more information, see Create a recommendation.

Recommendation form fields

Field	Description
Rule	The name of the rule for the context. This field is read-only.
Context	The name of the context that the **Rule** belongs to. This field is read-only.
Name	The name of the recommendation.
Action type	The type of recommendation: • Guidance • Decision tree • Field recommendation • Playbooks This field is automatically filled with the selection from the New Recommendation screen.
Action	The action to select for the recommendation. The available actions are determined by the selection in the **Action type** field. You can also create an action for the selected action type of guidance, decision tree, or field recommendation.
Launch mode	Defines how to open the playbook from Recommended Actions panel: • Launch and show in side panel: The playbook opens in the Suggested Actions tab of the Recommended Actions Contextual Side Panel. • Launch only: The playbook opens in record view. **Note:** This field appears when you select the `Playbooks` option in the Action Type field.
Resource generator	The resource generator to select from the Resource generators list. You can also create a resource generator. Guidances and field recommendations can use resource generators to find relevant resources for the action inputs. If you change the value in the **Resource generator** field, you must save the recommendation to use the resource generator.
Recommendation hint	Text that tells the agent why a recommendation is being suggested. Hints apply to action types of guidance and decision tree.

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Recommendation form fields (continued)

Field	Description
	The hint appears at the top of the action cards in the Recommended Actions side panel.
Order	The order of the recommendations inside the rule.
Active	When enabled, the recommendation is active.
Action inputs	Action types and actions require inputs. These inputs are the parameters that enable agents to complete an action. You can choose static values for action inputs, or you can use a resource generator to supply values. If a context input is available for the context, it appears in the pill picker of the fields in Action inputs section.
Group	Group created by a defined grouping strategy that displays relevant recommendations together. **Note:** You might need to configure the Recommendation form to display the **Group** field. This field is available by default for Workforce Optimization for ITSM users.

Note: The **Action type**, **Action**, and **Recommendation hint** fields aren't shown for the AI search resource generator. You can configure the **Action type** and **Action** fields, and mapping between AI search outputs and guidance actions inputs in the Search result mapping related list.

Context inputs in Recommended Actions

A context input enables you to associate entities beyond just the context table with a context ensuring that recommendations are updated dynamically as the context evolves.

You can create a context input from the Context inputs related list in the Context form. These dynamic JSON-based context inputs enable you to include real-time updates such as user selections, additional table records, and so on, to refine recommendations and support multiple active contexts. This enhances recommendation relevance and operational efficiency. For example, you can create a context input for the Incident table and use in the Case context record.

Note: You can create multiple active context inputs for a context.

The following data types are supported for a context input:

- String
- List
- Integer
- Long
- Choice
- True- false
- Reference

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- Reference dot walked
- Sys id

Configuring a context using a context input

Configuring a context using context inputs includes the following steps:

- Creating a context input. For more information on how to create a context input, see Create a context input in Recommended Actions.

  Note:
  - If a context has a parent context defined, you can't create context inputs for it.
  - You can have multiple active context inputs simultaneously.

- Mapping the context input to the following according to your requirement:
  - default search term by adding it in the Contextual AI Search Config section on Context form.
  - rules by using it in the condition builder on Rules form.
  - recommendations by adding it in fields of the Action inputs section on Recommendations form.
  - resource generators by adding it in the fields of Generator inputs section on Resource Generators form.
- Adding the JSON-format of the context inputs to the Recommended Actions component for the required record pages in the UI Builder. For more information, see Configuring Recommended Actions UIB component for context inputs.

The context inputs appear along with the context table in the appropriate fields of Rule, Recommendation and Resource generator forms so that you can include the data other than that of the context table to update the recommendations.

Configuring Recommended Actions UIB component for context inputs

As an RA author or admin, you must add the JSON-format of the context inputs in the **Context input** field of Recommended Actions UIB component of a record page to pass the values. You can get the JSON-format of the context input by selecting the **Copy input JSON** button on the Context input related list in the Context form. The JSON-format includes all the active context inputs. When a context input is deleted or deactivated after configuring the Recommended Actions UIB component, an empty value is passed for these context inputs in UIB from the upcoming iterations.

Note: If you set a context input as mandatory in the Context input form and fail to set contextual inputs on Recommended Actions component of the record page in the UIB, the recommendations are not be generated.

Context Input configuration limitations

The limitations for context inputs configuration are as follows:

- You can either define a parent context or configure context inputs for a context.
- When context inputs are defined for a parent content, then it's rules and recommendations cannot be inherited by its child contexts. In other words, the parent context does not appear in the Parent context field of the Child context.

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- To define context inputs for a context which has a parent context defined already, delete the parent context in the Parent context field so that the Context inputs related list appears. And in the Context inputs related list, select the New button to create context inputs.
- When a context input is defined for a parent context which has a child context associated, then the parent-child context link is broken. In the child context, the inherited rules and recommendations will be removed from the Inherited Rules and Recommendations related list respectively.

Guidances in Recommended Actions

A guidance is an action that an agent can take or information that an agent can share as they work to resolve tasks, such as customer service cases.

Guidances appear as cards in the contextual side panel in a workspace. Agents can access these guidance cards by selecting the Recommended Actions icon in the contextual side panel. Agents can then perform the actions by selecting a button on a card.

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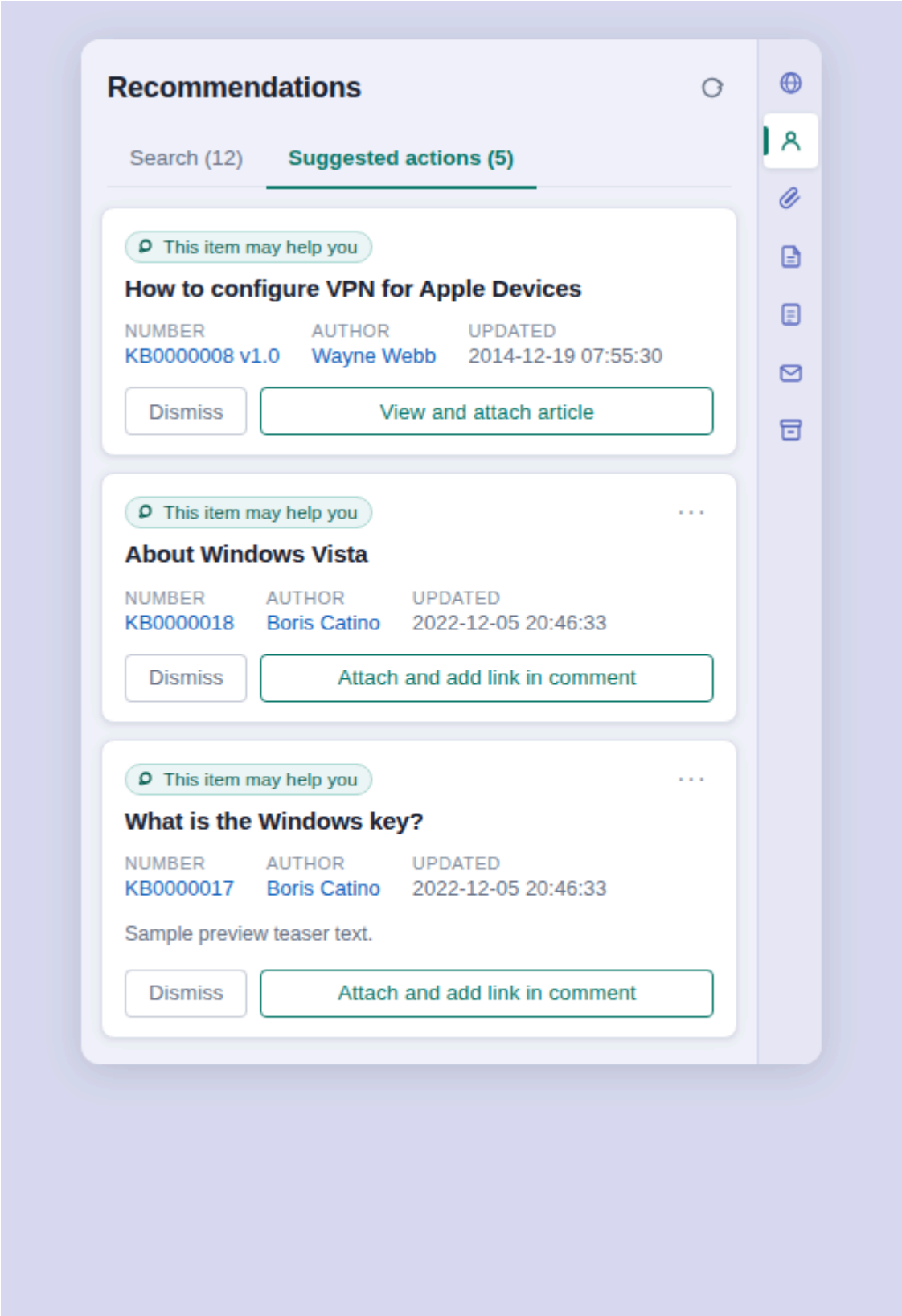
Recommended actions guidance cards



Guidances include actions such as sharing a knowledge article, creating a case task or a work order, or copying the resolution notes from a similar case. For a detailed list of guidances, see the following table.

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Guidances in Recommended Actions

Guidance	Description
Apply resolution from a solved case	Applies the resolution from an existing solved case.
Attach and share article	Enables the agent to attach a knowledge article to a case and share the article with the customer.
Communicate workaround	Communicates a workaround to the customer.
Copy resolution notes	Copies the resolution notes from the recommended case to the current case.
Create work order	Creates a work order for a case.
Default guidance for search results	Default guidance that can be used for any search sources that don't have dedicated mapped guidances. For more information, see the following topics: • Automatically map AI search results with guidance inputs • Default guidance for search results .
Link case	Links the current case as a child of the recommended case.
Link case to existing defect	Links a case to an existing defect.
Open collab chat	Opens the collaboration chat modal.
Propose major issue	Proposes the current case as a major case.
Propose resolution	Proposes a resolution for a case.
Read message to customer	Directs the agent to read a message to the customer.
Reassign case	Reassigns the case to a different assignment group.
Review and attach article	Enables the agent to review and attach a knowledge article to a case.
Share KB in chat interactions	Shares a knowledge article in the chat window in an interaction record.
Similar major case	Displays similar major cases.

Attaching and sharing knowledge articles

Agents can use two different guidances to view and attach knowledge articles to task records and chat interaction records and share articles with customers.

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Guidances for attaching and sharing knowledge articles

Guidance	Description
Attach and share article	This guidance recommends knowledge articles to an agent who is working on a task, such as a case record. The guidance displays relevant articles and enables the agent to select an article and share it in a comment, a work note, or an email: • Attach and add link in comment • Add link in work note • Attach and add link in email
Share KB in chat interactions	This guidance recommends knowledge articles to an agent who is working on a chat interaction. The guidance displays relevant articles and enables the agent to select an article and share it in the chat conversation using Add link in message feature.

Configuring Recommended Actions guidances

Recommended Actions is a component that you can add to a record page in UI Builder. You can find information about configuring the Recommended Actions component, including the properties and events, in the Next Experience Components documentation.

The Recommended Actions component includes two views: a preview view (card view) and a detail view (full article view). How these views are displayed is determined by the Recommended Actions configuration. For more information, see the following topics:

- Create a guidance in Recommended Actions
- Configure a guidance preview experience
- Customize a guidance preview experience in UI Builder
- Customize a guidance detail view in U Builder

The Recommended Actions component includes **Recommended Action Specific Configuration** property. Users with the administrator role can use this property to configure the following settings:

- Select which type of experience to uptake on a record page: modal or modeless dialog.
- Select which of the guidance actions to show or hide.
- Order the guidance actions to determine the primary action (displayed as a button on the guidance card) and secondary actions (displayed on the overflow menu).

The **Recommended Action Specific Configuration** property is available in the Configure tab of the Recommended Actions component and includes expandable sections for each guidance.

Access to internal field values for predicted records

When accessing data for a predicted record within the Recommended Actions framework, the system provides the internal field values, in addition to display values, through standard guidance inputs. The system does so without requiring data brokers or custom scripts. By

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enabling direct access to internal values, the framework can support more complex logic, reduce performance bottlenecks, and verify consistent UI behavior across languages.

For catalog items:

- When the catalog item type field is used in a catalog item prediction, the system returns the internal value (for example, the catalog item or order guide) along with the sys_id.
- When the catalog item type field is accessed in a translated environment, the system relies on the internal field value instead of the display value to verify the language settings do not affect condition fulfillment.

For custom guidances based on the incident state:

- When custom guidance logic is applied to a predicted incident with a specified state, the system accesses the internal value of the incident's state field directly.
- When the state field is required for custom actions like linking an incident as a parent or copying resolution notes, the internal value should be accessible without causing UI performance issues or delays.

Attach and share article guidance

The Attach and share article guidance recommends relevant knowledge articles to customer service agents and enables them to share the selected articles in comments, work notes, or email.

The Attach and share article guidance recommends relevant knowledge articles based on the text in the case short description. Agents can view the recommended articles and share a selected article with the customer.

The agent can view the knowledge articles in a card format in the contextual side panel or expand a selected card to see an article in a detail view. The card view provides a condensed view of articles for quick scanning. The detail view provides the full content of the selected article for further reading.

Each card contains a primary action. The default primary action is Attach and add link in comment. Secondary actions are available in the More actions menu in the upper right corner of the card:

- Add link in work notes
- Attach and add link in email

The same primary and secondary actions are available in the expanded detail view. The system administrator can configure the primary and secondary actions in the **Recommended action specific configuration** property. For more information, see Configuring guidances in UI Builder.

The relevancy score displays on the Attach and share article guidance in the Search tab of the Recommended Actions contextual side panel. It indicates how well a search result matches the agent's query.

Modal and modeless dialog experiences

The agent can share the article in a comment, a work note, or an email using the primary and secondary actions. Two different experiences are available for this guidance depending on the record page you are using in the CRM Workspace:

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- **Modeless dialogs**: This experience is available for record pages that support modeless dialogs (for example, the Front-line case page). Modeless dialogs are windows that overlay the main window content. Agents can move modeless dialogs around the window so they can interact with the window content and overlay content at the same time.
- **Modals**: This experience is available for record pages that support modals (for example, the CSM default record page). With modals, agents must complete the action within a modal before continuing to interact with the window content, which is the default experience.

The system administrator can configure the modal and modeless dialog experiences in the **Recommended Action Specific Configuration** property. For more information, see Configuring guidances in UI Builder.

If a record page supports the modeless dialog experience, selecting an action on a guidance card opens the corresponding modeless dialog. If a record page does not support the modeless dialog experience, the guidance uses the modal experience.

Note: The result of guidance actions is the same in the modeless dialog and modal experiences, but when the actions are completed differs.

Public and private knowledge articles recommendations for case records

Some knowledge articles that appear in the search results display a lock icon in the upper left corner. The presence or absence of the lock icon determines the audience for the article and how an agent can share the article.

The *`KnowledgeGuidanceUserResolver`* extension point is shipped with the base system. This extension point allows business units (BUs) to return the requester and primary action based on their logic by creating the implementation in this extension point. You can create an implementation by selecting the **Create Implementation** link in the *`KnowledgeGuidanceUserResolver`* extension point. The `CSMKnowledgeGuidanceUserResolver` implementation for the Case table and its extended tables is shipped with the base system. This implementation identifies the primary requesters for a case record based on the Contact, Partner Contact, Consumer and Internal user fields in the Case table. The primary action is determined based on the channel type of the case record.

Note: The Internal user field is checked only when the Service Organization (com.snc.service_organization) plugin is installed.

Lock icon

Agents can't share locked articles with customers as the customers do not have access to these locked article. The **Attach and add link in email** and **Attach and add link in comment** actions are not available when a lock icon is present on a guidance card. The following table shows the primary and secondary actions in preview and detail view on the guidance card:

Primary and secondary actions in preview and detail view on the guidance card

Action type	Description
Preview	
Primary actions	The default primary action is **Read article**.

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Primary and secondary actions in preview and detail view on the guidance card (continued)

Action type	Description
Secondary actions	• Share in work notes • Copy Link
Detail view	
Primary actions	The default primary action on the guidance card is **Read article in full view**.
Secondary actions	• Share in work note • Copy Link • Flag article • Mark as helpful

No lock icon

Agents can share these articles with both customers and internal users. The following table shows the primary and secondary actions in preview and detail view on the guidance card:

Primary and secondary actions in preview and detail view on the guidance card

Action type	Description
Preview	
Primary action	The default primary action by channel: • Email channel: Attach and add link in email • Other channels: Attach and add link in comment
Secondary actions (available in the more options menu)	• Read article • Attach and share in work notes • Share in email • Flag article • Mark as helpful
Detail view	
Primary action	The default primary action:

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Primary and secondary actions in preview and detail view on the guidance card (continued)

Action type	Description
	• Email channel: Attach and add link in email • Other channels: Attach and add link in comment
Secondary actions (available in the more options menu)	• Read article • Attach and share in work notes • Share in email • Flag article • Mark as helpful • Read article in full view

Attach and add links in comments

Use this action to attach a knowledge article to a case record and share the link in the activity stream. The behavior of the action depends on the modal or modeless dialog experience.

Experience	Description
Modal	This action does the following: • Opens the Compose a comment modal. • Inserts the article link in the **Comments** field. The agent can add information to the **Comments** field and select **Post Comments**. • The knowledge article is attached to the case record. • The activity stream is updated with the article attachment (as an internal post). • The comment and the link are posted to the activity stream (as an external post). • The guidance is marked as complete and moved to the Recommended Actions History tab. This action is available as the primary action on the knowledge article card. **Note:** This guidance is available by default.
Modeless dialog	This action does the following:

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Experience	Description
	• Attaches the article to the case record. The article is available in the Attached Knowledge related list. • Updates the activity stream with the article attachment as an internal post. • Marks the guidance as complete and moves it to the History tab. • Opens the Compose a comment modeless dialog. • Inserts the article link in the **Comments** field. The agent can add information to the **Comments** field and select **Post Comments**. The comment is posted to the activity stream as an external post.

Add link in work note

Use this action to attach a knowledge article to a case record in the work notes. The behavior of the action depends on the modal or modeless dialog experience.

Experience	Description
Modal	This action does the following: • Opens the Compose a work note modal. • Inserts the article link in the **Work notes** field. The agent can add information to the **Work notes** field and select **Post work notes (private)** to post the work note and the link to the activity stream as an internal post. • The activity stream is updated with the article attachment as an internal post. • The guidance is marked as complete and moved to the Recommended Actions History tab. This action is available as a secondary action in the More actions menu. **Note:** This guidance is available by default.
Modeless dialog	This action does the following: • Opens the Compose a work note modeless dialog. • Inserts the article link in the **Work notes** field. The agent can add information to the **Work notes** field and select **Post work notes (private)** to post the work note and the link to the activity stream as an internal post. The guidance is marked as complete and moved to the History tab.

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Attach and add links in emails

Use this action to attach a knowledge article to a case record and share the link in an email. The behavior of the action depends on the modal or modeless dialog experience.

Experience	Description
Modal	This action does the following: • Opens the Email compose modal. • Inserts the article link in the body of the email. • If available, an email template auto-fills modal fields. The agent can add information to the email and select **Send email**. • The email is sent. • The knowledge article is attached to the case and is available in the Attached Knowledge related list. • The activity stream is updated with the article attachment (as an internal post). • The guidance is marked as complete and moved to the Recommended Actions History tab. This action is available as a secondary action in the More actions menu. **Note:** This guidance is available by default with the modeless dialog experience. For the modal experience, it must be configured by the system administrator.
Modeless dialog	This action does the following: • Attaches the article to the case record. The article is available in the Attached Knowledge related list. • Updates the activity stream with the article attachment as an internal post. • Marks the guidance as complete and moves it to the History tab. • Opens the Email compose modeless dialog. • Inserts the article link in the body of the email. • If available, an email template auto-fills email fields.

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Experience	Description
	The agent can add information to the email and select **Send email**.

More actions menu

The More actions menu on a guidance card includes several actions in addition to **Add link in work notes** and **Attach and add link in email**.

In the card view, these actions include:

- Read article
- Copy link

In the detail view, these actions include:

- Read article in full view
- Copy link
- Mark article as helpful
- Flag article

Share KB in chat interactions guidance

The Share KB in chat interactions guidance recommends relevant knowledge articles to customer service agents and enables them to share the articles in chat conversations on chat interaction records.

The Share KB in chat interactions guidance recommends relevant knowledge articles to agents who are working on chat interactions. The guidance surfaces relevant knowledge articles based on the text in the interaction short description. Agents can view the recommended articles and share a selected article in the chat conversation.

The Share KB in chat interactions guidance enables automatic search results for knowledge articles by using the text in the interaction **Short description** field. The first article listed is the most relevant result. Agents can also manually search for articles.

Note: If there's no text in the **Short description** field, no search results are displayed.

This guidance includes the following actions for sharing:

- **Send in chat**: Agents can share the article with customers.
- **Send in private chat**: Agents can only share the article with internal users such as other agents or managers. Customers can't access locked articles. Private chat messages use a yellow background.

The relevancy score displays on the Share KB in chat interactions guidance in the Search tab of the Recommended Actions contextual side panel. It indicates how well a search result matches the agent's query.

Public and private knowledge articles

Some knowledge articles that appear in the search results display a lock icon in the upper left corner. The presence or absence of the lock icon determines the audience for the article and how the agent can share the article.

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- Lock icon: The guidance card has a **Send in private chat** action. Agents can't share locked articles with customers.
- No lock icon: The guidance card has a **Send in chat** action. Agents can share these articles with both internal users and customers.

Send in chat

When an agent selects **Send in chat**:

- An information message is displayed.
- The number of the knowledge article is inserted in the chat.
- The knowledge article preview card is inserted in the chat. The card includes a link to the article and the article short description.

Send in a private chat

When an agent selects **Send in private chat**:

- The number of the knowledge article is inserted in the chat along with the lock icon.
- The knowledge article preview card is inserted in the chat along with the lock icon. The card includes a link to the article and the article short description.
- The entries use a yellow background indicate that it's a private chat.

Share knowledge articles in phone interactions

During a phone conversation, agents can send helpful knowledge base (KB) articles to customers through SMS using the **Add link in message** option.

Before you begin

Required plugins: To enable the **Add link in message** functionality, install the following plugins:

- Conversational SMS Service Channel (sn_awa_sms_int)
- Agent Messaging Component (sn_agent_messaging)
- Agent-Initiated Messaging Interface (sn_agent_initiated)
- SMS Adapter Plugin (for example, sn_sms_aws_adapter, or any other supported SMS adapter)

> **Note:** The system supports multiple SMS adapters. Verify that your selected adapter is compatible with the Conversational SMS framework.

If the required plugins are not installed, the **Add link in message** action is not available. Instead, the system displays other guidance actions such as:

- Copy link (default primary action)
- Read article in full view
- Mark article as helpful
- Flag article

Role required: none

Procedure

1. Select **Add link in message** in the interaction record.
   The Compose Message modal opens with a preview to the article and a pre-filled message.

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2. Customize the message as needed.
3. Review how the **To** field is populated.
   During phone interactions, the system auto-populates the To field using the following order:
   - If the **Contact** field is populated, the phone number from that contact is used.
   - If the **Contact** field is empty, the system uses the phone number from the Opened For field.
   - If both fields are empty, agents can manually enter a valid phone number.
4. **Optional:** If an agent manually changes the phone number in the To field:
   - The system treats it as a new interaction.
   - The previous message is logged as sent to the original number.
   - The new message is tracked separately to maintain clarity on what was shared and with whom.
5. Select **Send** to send the message to the customer.
6. After the message is sent:
   - A confirmation appears in the Notifications panel.
   - Select **View interaction** from the notification to open the related interaction record.
   - The message also appears in the Active SMS side panel.

Share knowledge articles in messaging-type interactions

Agents can share helpful knowledge base (KB) articles with customers during messaging-type interactions. Using the **Add link in message** option, agents can insert article links directly into the conversation to provide timely, contextual assistance.

Before you begin

Required plugins: To enable the **Add link in message** functionality, install the following plugins:

- Conversational SMS Service Channel (sn_awa_sms_int)
- Agent Messaging Component (sn_agent_messaging)
- Agent-Initiated Messaging Interface (sn_agent_initiated)
- SMS Adapter Plugin (for example, sn_sms_aws_adapter, or any other supported SMS adapter)

> **Note:** The system supports multiple SMS adapters. Verify that your selected adapter is compatible with the Conversational SMS framework.

If the required plugins aren't installed, the **Add link in message** action isn't available. Instead, the system displays other guidance actions such as:

- Copy link (default primary action)
- Read article in full view
- Mark article as helpful
- Flag article

Role required: none

Procedure

1. Select **Add link in message** in the interaction record.
   The Compose Message modal opens with a preview to the article and a pre-filled message.
2. Customize the message as needed.

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3. Review how the **To** field is populated.
   The system auto-populates the To field using the following order:
   - If the **Contact** field is populated, the phone number from that contact is used.
   - If the **Contact** field is empty, the system uses the phone number from the Opened For field.
   - If both fields are empty, agents can manually enter a valid phone number.

   Note:

   The To field is visible only in new interactions. In existing interactions, it's hidden, and the message box shows only the KB article link and the interaction details appear in the modal.

4. **Optional:** If an agent manually changes the phone number in the To field:
   - The system treats it as a new interaction.
   - The previous message is logged as sent to the original number.
   - The new message is tracked separately to maintain clarity on what was shared and with whom.
5. When the Add link in message action is used during a messaging-type interaction:
   - If an interaction is already in progress, the KB article link is added directly to the existing message.
   - If no interaction is active, the system creates a new interaction to deliver the KB article.
6. Select **Send** to send the message to the customer.
7. After the message is sent:
   - A confirmation appears in the Notifications panel.
   - Select **View interaction** from the notification to open the related interaction record.
   - The message also appears in the Active SMS side panel.

Default guidance for search results

The Default guidance for search results is a guidance that can be used for any search sources that don't have mapped guidances.

Using AI search results in Recommended Actions requires a search application configuration. For each search source in that configuration, the admin creates a mapping from the search result to an action.

Starting with the Yokohama release, the Recommended Actions application automatically creates the mapping between search results and actions.

When an admin creates or updates the search application configuration for a context record, the system automatically creates search result mapping records for each of the search sources in that configuration.

- If a search source does not have an existing mapping to an action, the system maps the search source to the default guidance.
- If a search source has an existing mapping to a specific action, the system keeps that mapping and does not overwrite it with the default guidance.

The default guidance enables agents to view search results for any type of record. The agent can view the search results in the Recommended Actions tab in the contextual side panel in CRM Workspace. Search results are displayed in a card format.

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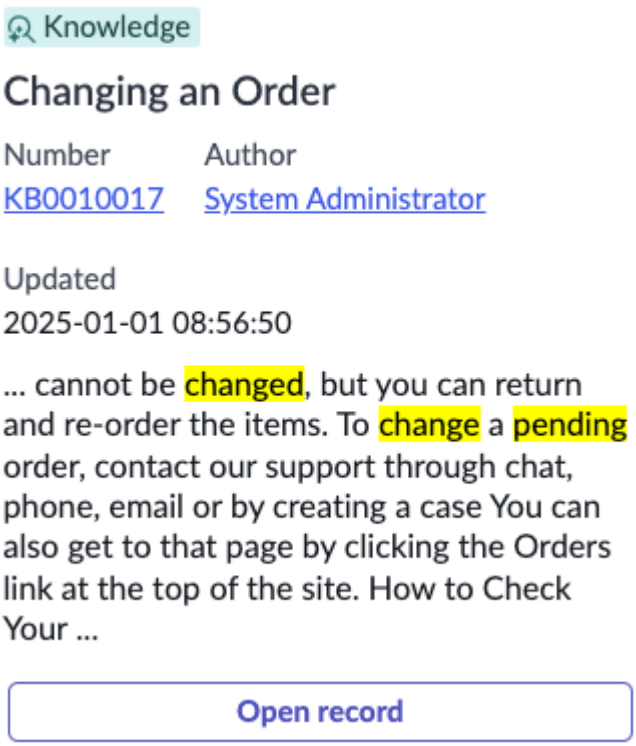
The default guidance is available on the following pages:

- CSM default record page
- Front-line case page
- CSM Interaction record page of type chat, video, email, and Walkup

Default guidance card

The preview card for the default guidance displays information about the search result.



The preview card for the default guidance includes the following elements.

Element	Description
Search icon	The search icon appears at the top of the card along with the hint text. The icon is made up of a magnifying glass with a sparkle. This icon makes it easy for customers to identify search results from suggested actions.
Hint text	Text that provides context for the guidance. The icon and hint text appear together at the top of the card above the title.
Title	The title appears at the top of the card.
Relevancy score	The relevancy score displays on the Share KB in chat interactions guidance in the Search tab of the Recommended Actions contextual side panel. It indicates how well a search result matches the agent's query.

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Element	Description
Record fields	Relevant fields related to the guidance content are displayed on the card. These fields provide key information about the guidance content. For example, a preview card for a knowledge article includes fields for the article number and author while the preview card for a case includes fields for the case number, state, and priority.
Dismiss	Agents can use this action to move the guidance from the Suggested actions tab to the Actions history tab. After selecting **Dismiss**, the agent receives a notification that the guidance has been moved. To view the Actions history tab, click the clock icon in the upper right corner of the Recommendations panel.
Open record	Agents can use this action to open the associated record in a sub tab. Agents can view the record details in the sub tab without navigating away from the main window.

Related topics

Automatically map AI search results with guidance inputs in Recommended Actions

Playbooks in Recommended Actions

Playbooks are interactive, step-by-step guided workflows that help agents make decisions and resolve issues faster. Configure playbooks as recommended actions to deliver contextual guidance directly in the Recommended Actions Contextual Side Panel.

For more information on playbooks, see Playbooks in Customer Service Management.

Key concepts

Playbook action type

The Playbooks action type that enables authors and admins to add and configure playbooks as recommended actions. Admins configure and publish playbooks, and set launch behavior. Agents see playbooks as cards in the Suggested Actions tab of the RA panel in the Agent Workspace and can execute them inline with minimal tab switching.

Launch mode

The behavior that determines how a playbook opens when an agent selects the **Launch** button on the Playbook card in the Recommended Actions panel in the Agent Workspace. Options include Launch in side panel (opens playbook in the side panel) and Launch in expanded view (opens playbook in a related tab).

Playbook execution state

The shared execution context of a playbook across users and sessions. When a playbook completes, the system automatically marks the related recommended action as completed. Multiple agents viewing the same recommended action see a synchronized playbook state.

Execution history

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A record of past playbook executions, including outputs and timestamps. Agents can review execution history under Recommended Actions history to understand prior resolutions.

What you can do with playbooks in Recommended Actions

As an admin, you can perform the following on the playbooks in Recommended Actions:

- Add playbooks as a new action type when authoring recommended actions.
- Execute playbooks directly from the Recommended Actions panel without switching between the tabs.
- Monitor playbook completion and synchronize state across team members.
- Review execution history for audit and training purposes.

Related topics

Configure a playbook as a Recommended Actions

Resource generators in Recommended Actions

Resource generators in Recommended Actions provide resources that you can use as inputs to actions such as guidances and field recommendations.

Resource generators provide resources such as a knowledge article, a set of cases, or a field value that you can use in recommendations. Agents can use these recommendations in the Recommended Actions panel in a workspace such as CRM Workspace.

Another way to think of a resource generator is as a function with inputs and outputs. For example, you can create a resource generator that predicts a knowledge article and then use that knowledge article as a recommended action for a case.

You can select a resource generator from the list or create a resource generator. For a complete list of resource generators that are included with the Recommended Actions application, see Components installed with Recommended Actions.

Resource generator types

The Recommended Actions application provides the following resource generator types:

- Decision table
- Flow
- Scripting
- AI search

The Recommended Actions - Advanced application provides the following additional resource generator types:

- Classification
- Similarity
- Similarity with Trend
- Task Intelligence Classification
- Task Intelligence Similarity
- Task Intelligence Similarity with Trend

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These resource generator types are based on the Predictive Intelligence framework that you can use to create machine learning solutions.

Resource generator type	Definition
Decision table	Returns the results of the selected decision table. Use decision tables to help you resolve a complex decision that depends on multiple inputs and predetermined outputs. For example, a decision table might require inputs such as age, location, and health history to provide suggestions for different aspects of health insurance. You can use these suggestions, which are the outputs of the decision table, as action inputs for a recommendation. For more information, see Decision Tables.
Flow	Returns recommendations generated by executing the selected subflow. Use subflows to define logic and automate outputs for the resource generators. For example, you can find relevant KB articles using inputs such as product name, activation state, and publishing status. You can then propose to attach these KB articles as a recommended action. For more information, see Flow Designer.
Scripting	Returns recommendations generated by executing the selected script include. You must create an implementation of the ScriptingGeneratorFactory template to use a script include in the Scripting resource generator type. For more information, see Script includes.
AI search	Returns the AI search results and genius results based on real-time data and insights regardless of the search source. These results are relevant to the context of a record. This resource generator type requires the following inputs: • **Search field** - The field on which the AI search is performed. • **Top N results** - The number of records to return from the AI search. For example, you can configure AI search to recommend a KB article or similar case based on the relevancy and context of the short description. For more information, see AI Search.
Classification	Uses machine learning algorithms to recommend field values during record creation. This resource generator type requires the following inputs: • **Classification definition** - The Predictive Intelligence classification model to return the predicted values or record references for a field on a table. • **Top N Results** - The number of values or records to return from the relevant records predicted by the classification definition.

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Resource generator type	Definition
	For example, you can configure the classification solution to recommend a value for the category or assignment group based on the short description. For more information, see Predictive Intelligence.
Similarity	Identifies existing records with similar values to a context record. You must create a word corpus that acts as a vocabulary for the machine learning system to compare trained records. This resource generator type requires the following inputs: • **Similarity definition** - The similarity solution definition to return records that are relevant to the context record. • **Top N Results** - The number of records to return from the relevant records predicted by the similarity definition. For example, you can find similar resolved cases to propose a resolution as a recommended action. For more information, see Predictive Intelligence.
Similarity with Trend	Uses a trend definition to find commonality in the records returned by the similarity solution. You can configure the trend definition using a common condition, common field, or common reference, and a threshold value for the minimum number of records that must follow a trend. This resource generator type requires the following inputs: • **Similarity definition** - The similarity solution definition to return records that are relevant to the context record. • **Trend definition** - The trend definition to filter the relevant records that follow a trend. For example, you can find similar major incidents with a trend. Then, you can propose to link the current context record to this major incident.
Task Intelligence Classification	Uses machine learning models created in Task Intelligence Admin Console to recommend field values. The models provide flexible options to either auto-fill values on the record form or to provide recommendations depending on the sensitivity of those fields. **Note:** The field values are not recommended for fields when the TI model is in the background mode. This resource generator type requires the following inputs: • **Solution**: The solution contains configuration for recommended input fields and recommended output fields for prediction. The solution also contains preference whether the fields are auto-filled or a recommendation message is displayed. The Task Intelligence classification

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Resource generator type	Definition
	model predicts multiple values or record references for fields on a table. • **Top N Results** - The number of values or records to return from the relevant records predicted by the solution definition. For example, you can configure the Task Intelligence classification solution to recommend a value for the category or assignment group based on the short description. For more information, see Task Intelligence. **Note:** The Task Intelligence Admin Console (com.sn_ti_admin) plugin must be installed for selecting the Task Intelligence Classification resource generator type.
Task Intelligence Similarity	Identifies existing records with similar values to a context record. Uses machine learning models created in the Admin Console to recommend field values. This resource generator type evaluates the results of the Task Intelligence Admin Solution and returns the predicted values/ records for multiple fields. This resource generator type requires the following inputs: • **Model**: Reference to the Task Intelligence Admin Similarity model. • **Top N Results**: The number of values or records to return from the relevant records predicted by the solution definition. This resource generator type returns the following outputs: • **Predicted value**: For non-reference type fields, the Task Intelligence Admin Solution returns a predicted value. • **Predicted record**: For reference type fields, the Task Intelligence Admin Solution returns a predicted record. For more information, see Task Intelligence.
Task Intelligence Similarity with Trend	This resource generator evaluates the trend on the results of TI Similarity prediction. Using the solution (sn_ti_admin_solution) and trend (sn_nb_action_trend_definition) definitions, this resource generator type identifies records similar to the context record. Further, it analyzes these similar records to determine if they follow the specified trend. This resource generator type requires the following inputs:

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Resource generator type	Definition
	• **Solution**: Reference to the Task Intelligence Admin Similarity Model. • **Top N Results**: Specifies the number of predicted values/ records to be sent to the similarity prediction server. • **Trend definition**: Reference to the Trend Definition (sn_nb_action_trend_definition) table. This resource generator type returns the following outputs: • **Count**: Number of total records found in the trend. • **Oldest created record**: Oldest record in the trend. • **Highest confidence record**: Reference of the highest confidence ML result record. • **Qualified Records Sys IDs**: List of sys IDs of all qualified records. For more information, see Task Intelligence.

Timeout handling for resource generators

The Recommended Actions application uses a subflow API with a defined timeout when calling Machine Learning (ML) resource generators. This timeout ensures the RA generation engine prioritizes faster response times by terminating stalled ML prediction calls.

The subflow has a timeout setting of 1 second. If there is a delay and the predict call times out, the system generates a message.

The subflow applies to the following ML-based resource generators:

- Similarity
- Task Intelligence Similarity
- Similarity with Trend
- Task Intelligence Similarity with Trend

The *sn_nb_action_adv.similarity_prediction.timeout* system property controls the timeout value of the subflow. The default value is set to 1000ms.

Related topics

Create a resource generator in Recommended Actions

Domain separation and Recommended Actions

Domain separation is supported for Recommended Actions. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

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- 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.

Overview

The tables and data in the application are domain separated. Recommendation authors can only see the context applicable to them based on the domain. In runtime, recommendations are evaluated in the user context and data is created in the corresponding domain applicable to the user.

How domain separation works in Recommended Actions

To use domain separation in the Recommended Actions application, you can create separate Context records for each domain. Context serves as a starting point in Recommended Actions. All other configurations such as Rule, Recommendation, and Resource Generator can then be associated with the domain of the corresponding context record.

Runtime evaluation and generation of recommendations are user-specific. The user's domain is selected and the corresponding Rules applicable to the user are evaluated to give final recommendations to the end user. Execution records created use the same domain of the context that are applicable for the given user.

Domain-separated tables

When you create related entities for a context, the domain for the related entities is set to the domain of the context. The following tables in the application are domain separated:

- Context
- Recommended Action Rule
- Recommendation
- Resource generator
- Recommendation group
- Search result recommended action mapping
- Recommended Action Context
- Recommended Action Execution
- Recommended Action Order
- Field recommendation
- Field recommendation input
- Field recommendation definition
- Resource generator type
- Resource generator type input

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- Recommendation grouping strategy
- Action Type Definition
- Trend Definition

Related topics

Domain separation for service providers

Queues for Recommended Actions application

Admins and Recommended Actions administrators can configure queues to manage the asynchronous evaluation of recommendations.

Access path and role requirements

To view or manage the queue, navigate to the following location in the application:

Navigate to **All** > **System Policy** > **Queue Registry**

Required Roles: admin or sn_nb_action.next_best_action_admin.

Default queue configuration

The Recommended Actions application includes a preconfigured queue by default, for processing actions efficiently.

- Queue Name: sn_nb_action.ra_processor_queue_1
- Scale Factor: 2
- Polling Interval: 5 seconds

Optimizing queue configuration for lower latency

To enhance responsiveness and reduce latency in action processing, consider increasing the Scale Factor, such as from **2** to **3**

- Queue Name: sn_nb_action.ra_processor_queue_1.
- Updated Scale Factor: 3
- Polling Interval: 5 seconds

Considerations for scaling

Increasing the Scale Factor enables the queue to process more items concurrently and reducing latency. However, it also increases demand on system resources such as CPU and memory.

AI search in Recommended Actions

Enable agents to use AI search in Recommended Actions to find relevant resources or resolutions for customer issues.

AI search results and genius results are displayed in the Search tab of the Recommended Actions component in the contextual side panel. Agents can initiate actions from the search cards directly to resolve an issue.

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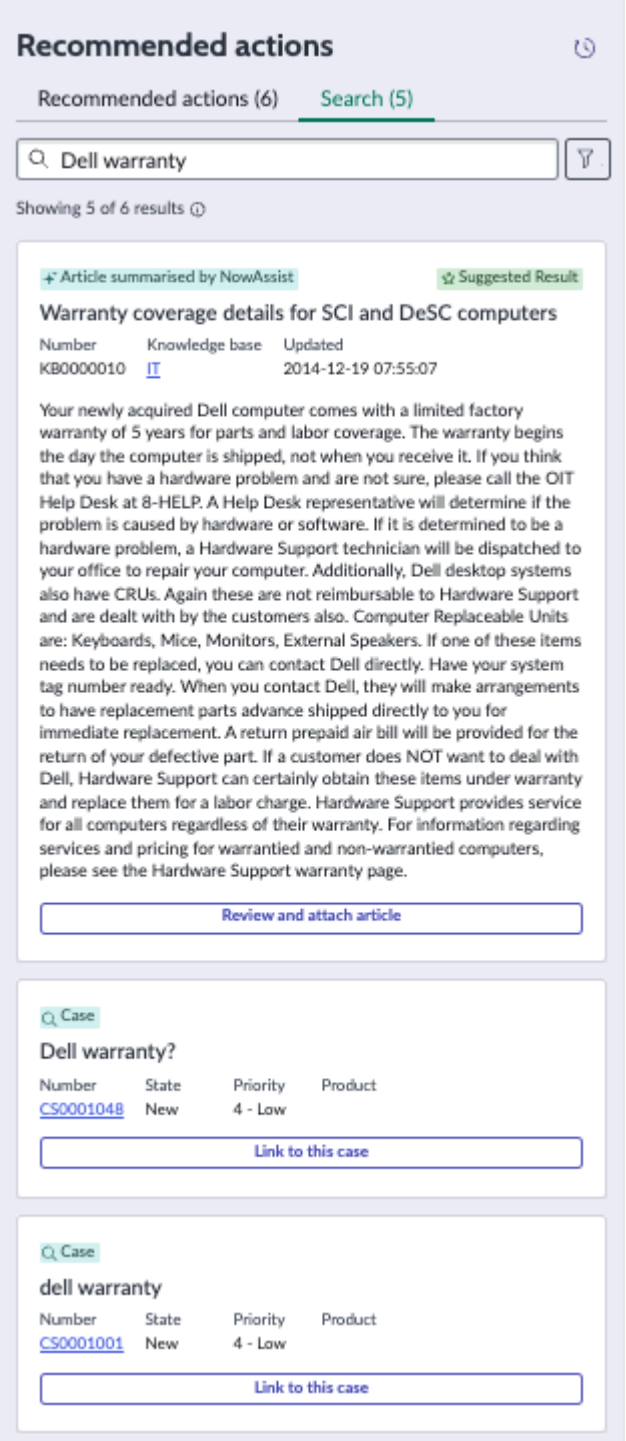

The search results from the configured search sources are displayed in the form of cards. These cards are previews of search records. You can select the card to view the record details or directly take actions through the cards. The most relevant answers are displayed as top results in the form of genius result cards.

AI search harnesses advanced machine learning algorithms and natural language processing capabilities to comprehend user queries and provides the most relevant search results that can be employed to resolve issues effectively. For more information on:

- AI search and its features, see AI Search.
- enabling AI search for Next Experience, see Enable AI Search for Next Experience.

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AI search features

- Highlights search query terms that appear in the search results.
- Displays the most relevant results first with machine learning relevancy. Machine learning automatically tunes and improves the search result relevancy score for each search profile based on the answers agents select.
- Displays the best answers as genius result cards.

AI search benefits

- Maximizes efficiency: Use AI search integration to reduce task resolution time and improve agent productivity.
- Leverages contextual intelligence: Make the most of context-aware searching to provide accurate and timely responses.
- Provides summarization: Configure genius results to get large language model-based knowledge summarization to align with your content and information needs.

Configuring AI search in Recommended Actions

Steps to configure AI search in Recommended Actions include enabling the AI search tab, mapping the AI search results with guidance inputs, and customizing the Recommended Actions component. Advanced customization options include adjusting the number of results to view on a page, identifying genius results to add to the search profile, and configuring search sources. For more information, see Configuring AI search in Recommended Actions.

Using AI search in Recommended Actions

Enable customer service agents to use AI search for faster access to relevant information and take appropriate actions to resolve customer issues. For more information, see Use AI search in Recommended Actions to resolve cases.

- Accessing AI search: Agents can access the AI search tab in the contextual side panel of the workspace.
- Finding context-aware results: Agents can enter their search queries in the search bar. AI search uses natural language processing to understand user queries and considers task context to produce relevant results.
- Showing AI search results: Review AI search results and take actions directly from the search cards.
- Showing genius results: Agents can view the most relevant results at the top based on criteria defined in the genius results configuration, drawing their attention to the most relevant information first.
- Narrowing search results: Agents can select a search source from the **Search filter** field to display results only from that search source and then return to viewing all matching records.
- Viewing results count: The search tab shows counts of the total number of matching search results. The search filters show the number of matching results for each search source.

> **Note:** Search results displayed and the total search count may vary due to security permissions or if the search result has already been executed. The executed guidances are added to the Activity stream and moved to the Actions history. Executed guidances will be included in the total search count but will not show up in the search results.

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AI Search event and action logs for AI Search usage in Recommended Actions

AI search event and action logs capture user interactions and search activities, providing data for AI search analytics dashboards.

Search event and action logs

The logging of search-related events within a search system focuses on how search queries, results, and user interactions are recorded in various tables for analytics purposes.

- Search event logging: The search events logging, including search queries, results, and user actions, by queuing events and processing them into dedicated tables. The search events are queued in the Queued Signal Events table first and then when they're processed, they're moved into the search events table.
- Event logging triggers: The search events, search source events, and search signal events tables capture details like query changes, sources of results, and applied facet filters. The logging occurs not only when searches happen but also when filters, facets, or sorts are applied, ensuring comprehensive capture of user interactions with search features.

  Events are queued and then processed into the following tables:

  - Search Events table [sys_search_event]: Logs search queries, user info, and result status.
  - Search Source Events table [sys_search_source_event]: Captures the origin of the query (for example, catalog item).
  - Search Signal Events table [sys_search_signal_event]: Logs facet filters the facet filters applied on the results for a search query and source mappings.

  For more information on the preceding tables, see Search Suggestions tables.

- Search result action logging: Separate tables exist for logging clicks and actions on search results, including distinctions between normal and genius result actions, with multiple entries for multiple actions on a single source. When you interact with a search result, such as clicking on a link or performing an action, these actions are recorded. For the preview experience, actions like drill down are automatically logged to avoid duplication. This data is then used to populate analytics dashboards, either prebuilt or custom, enabling you to track and analyze the interactions with search results effectively.

  For custom guidances, you must emit the log search result event with the appropriate payload structure, which includes action-related data. Emitting action details in the payload is optional. Without it, events are still logged but lack specific action information, preventing duplication by using unique action IDs. Custom guidance actions require emitting events with a provided payload structure to log action details, while base system guidances handle this automatically. For payload structure, see Custom action log payload structure.

  - Search Result Events table [sys_search_signal_result_event]: Stores signal data for search results that you select.
  - Search Result Event Actions table [sys_search_signal_result_event_action]: Stores signal data for user interactions with search results.
  - Genius Result Actions table [sys_search_genius_result_event_action]: Stores signal data for user interactions with Genius Result answer cards.

  For more information on the preceding tables, see Search signal tables.

- AI search analytics: The logged data is then used to populate the AI search analytics dashboards, either prebuilt or custom, enabling you to track and analyze the interactions with search results effectively. For more information on the AI search analytics dashboard, see AI Search analytics dashboard. You can view the CSM workspace-related AI Search usage

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within Recommended Actions in the AI Search Analytics dashboard by selecting the **[CSM AIS] Configurable Workspace Search Config** option in the application drop-down on the top-right.

Custom action log payload structure

For custom action logging, that is, for the action you create on a guidance preview experience, you must emit an event with a payload structure that includes action-related data. Other common fields such as applied filters and views are handled by the system. If the payload is empty, the event will still be logged, but the action details won't be available. This structured payload is crucial for building detailed analytics dashboards, as it provides specific information about user interactions with custom actions.

```
api.emit(LOG_SEARCH_RESULT_EVENT, {actionData: {actionName:
 actionId}})
```

For more details on how to configure the payload for custom actions, see Customize a guidance preview experience in the UI Builder.

Hybrid search in Recommended Actions

Hybrid search combines keyword-based and semantic search to surface more relevant results in CRM Workspace, helping agents find KB articles and guided actions even when their phrasing does not match article content exactly.

Unlike keyword-only search, which requires exact term matches, hybrid search understands the context and intent behind a query. Agents using CRM Workspace will see more contextually relevant KB articles and guided actions in the AI search tab of the Recommended Actions contextual side panel.

How it works

When an agent performs a search in the AI search tab of the Recommended Actions in CRM Workspace, Recommended Actions processes the query using a hybrid approach:

- Keyword matching — returns results based on exact or close term matches.
- Semantic matching — uses AI to interpret the meaning and context of the query.

The two methods are combined to rank results, improving relevance without requiring agents to rephrase queries or use specific terminology.

Example: Hybrid search results

For example, a search for `My system keeps freezing` now returns relevant KB articles such as titled `Troubleshooting application performance degradation`, even if they do not use the word "freezing" — a query that previously returned no results with keyword-only search. With Hybrid Search, the article is surfaced because the search understands that freezing, lagging, and performance degradation describe the same problem. For more information on hybrid search, see Hybrid search in AI Search.

Default behavior

The **Enable hybrid search** check box on the **[CSM AIS] Configurable Workspace Search Config** record is set to `true` by default in the base system. No admin configuration is required to activate this feature. As an admin, you can disable hybrid search in the CRM Workspace by navigating to **All** > **AI Search** > **Search Experience** > **[CSM AIS] Configurable Workspace Search** and deselecting the **Enable hybrid search** check box.

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This configuration is specific to the CSM AI search application. Search configurations for portals or other workspaces are managed separately. If you do not find the **Enable hybrid search** check box for other workspaces, see the KB2735151 article to know how to enable hybrid search when the hybrid search check box is not available on the search configuration record.

Note: When Hybrid Search is active, the total result counts and facet counts are not displayed in the search results tab of the Recommended Actions contextual side panel.

Example configurations of recommended actions

This example documentation demonstrates end-to-end configurations of recommendations with actions of type guidance, decision tree, or field recommendation to help you get started with Recommended Actions.

Recommended actions examples

Scenario	Description
Troubleshoot a failed credit card transaction	A decision tree that helps agents troubleshoot a failed credit card transaction. This decision tree asks a series of questions and based on the answers entered, provides a resolution, such as track the failed transaction, dispatch a new credit card, or provide further assistance.
Recommend an assignment group for a router issue	A field recommendation that recommends a value for the Assignment group field so that the agent can assign the case to the appropriate team to resolve the customer issue faster.
Link the current case to the similar major case	A guidance that recommends linking the current case to the recommended similar major case so that the business owner can identify the trend and take corrective actions.

Example: Troubleshoot a failed credit card transaction

Learn how process analysts or business owners configure a recommended action that uses a decision tree to troubleshoot a failed credit card transaction.

Problem scenario

Paul was trying to purchase a smart watch using his StellarVest bank credit card. But the transaction failed at the time of payment. Paul created a case in the StellarVest bank customer support portal seeking assistance.

In this scenario, the agent assigned to the Paul's case is recommended to use a decision tree to troubleshoot the failed credit card transaction. The decision tree collects user, credit card, and transaction details. If money was debited, transaction tracking is initiated. However, if no money was debited, the agent provides a failure code, which determines what guidance is provided. Examples of potential guidances include: reassigning the case, creating a work order, or assigning the case to an IT technician.

Configuring a recommended action for troubleshooting a failed credit card transaction

Help process analysts configure a recommended action of type decision tree that enables agents to troubleshoot a failed credit card transaction reported by customers.

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Task	Description
Creating a decision tree	Create a decision tree that enables agents to ask a series of questions to customers. Based on the answers provided, agents can troubleshoot and provide resolution to customer issues. For more information about how to configure a decision tree in Decision Tree Builder, see Troubleshoot a failed credit card transaction decision tree.
Create a rule from the Case context record	Create a rule to show recommendations for active cases that meet the condition specified in this rule.
Create a recommendation with the decision tree as an action type	Create a recommendation that uses decision tree to troubleshoot a failed credit card transaction.

Create a recommendation with the decision tree as an action type

Create a recommendation to select Troubleshoot credit card transaction failure decision tree as an action type.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

About this task

New recommendations can only be created inside the rules.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select the Case context.
3. Select Active rule from the Rules related list.
4. In the Recommendations related list, select **New**.
5. In the New Recommendation screen, select **A guided flow to follow** to create a recommendation of type decision tree.
   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.
6. In the **Name** field, enter `Troubleshoot credit card transaction failure`.
7. In the **Action** field, select the action.
   The available actions are determined by the selection in the **Action type** field.

   a. In the **Action** field, select the lookup icon.
      In the resulting pop-up window, the **Table name** field is auto populated with the table that stores the available actions for the selected action type.

   b. In the **Document** field, select the Troubleshoot credit card transaction failure decision tree by clicking the lookup icon.
      For more information about how to create this decision tree, see Create Troubleshoot credit card transaction failure decision tree.

   c. Select **OK**.

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8. In the **Recommendation hint** field, enter `Troubleshoot credit card transaction failure`.
   The hint explains to agents why a recommendation is being suggested.
9. Select **Update**.

Example: Recommend an assignment group for a router issue

Learn how process analysts or business owners configure a recommended action of type field recommendation to recommend an assignment group for a router issue. This field recommendation uses a resource generator of type decision table that takes the router model and router issue as inputs and provides an assignment group as a result.

Problem scenario

QuantumLink Technologies, a newcomer to the networking equipment market, places a strong emphasis on customer satisfaction and resolving customer issues promptly. The business owners are committed to provide excellent customer service so that their business can thrive.

Alisha, one of the business owners at QuantumLink Technologies, sets up a recommended action that recommends a value for the Assignment group field based on the product model and problem specified by customers.

Rohit, a customer who recently purchased a QuantumLink router, is facing intermittent connectivity issues with his router. He creates a case on QuantumLink Technologies' customer support portal. John is frustrated by the disruptions in his internet service and is seeking a swift resolution to confirm uninterrupted connectivity for his home and work needs.

John Jason, the agent assigned to this case is recommended a field value for an assignment group so that this case can be assigned to the appropriate team and the issue can be resolved quickly.

Configuring a recommended action for recommending an assignment group for a router issue

Help Alisha configure a recommended action of type field recommendation that recommends an assignment group for a router issue.

Task	Description
Creating a decision table for recommending assignment groups	Configure a decision table that takes product and problem as inputs to provide the assignment group as an output. You can use this decision table in a resource generator.
Configure a resource generator for providing assignment group as an outcome	Configure a resource generator that you can use while configuring a field recommendation to provide the appropriate assignment group for the router issue.
Create a field recommendation for recommending assignment group field value	Create an action of type field recommendation for recommending a field value for the assignment group.
Create a rule from the Case context record	Create a rule to show recommendations for active cases that meet the condition specified in this rule.

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Task	Description
Create a recommendation with the field recommendation as an action type	Create a recommendation to surface the recommendation for the assignment group field value on a case record.

Creating a decision table for recommending assignment groups

Create a decision table with name **Assignment group for a router issue** that provides an assignment group as a result for a given product and problem combination.

This decision table requires two inputs:

Input	Type
Product	String
Problem	String

For the result, create the Assignment group column with Result type selected as Reference and Result table selected as Group [sys_user_group].

Configure the decision table conditions, results, and values as displayed in the following table. For more information, see Decision Tables.

Sample decision table: Assignment group for a router issue

Condition columns		Result column
Product	**Problem**	**Assignment gro**
Router M-series	Internet connectivity issue	Router-M-Tear
Router M-series	Router is heating up	Router-M-Tear
Router M-series	Network outage	Router-M-Tear
Router M-series	Security concerns	Router-M-Tear
Router N-series	Internet connectivity issue	Router-N-Tean
Router N-series	Router is heating up	Router-N-Tean
Router N-series	Network outage	Router-N-Tean
Router N-series	Security concerns	Router-N-Tean

Configure a resource generator for providing assignment group as an outcome

Configure a resource generator of type decision table that provides an assignment group for a given router model and associated issue.

Before you begin

Role required: sn_nb_action.next_best_action_author, sn_nb_action.resource_generator_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Resource Generators**.
2. Select **New** from the Resource Generators list.
3. In the **Name** field, enter `Assignment group for router issue` RG.

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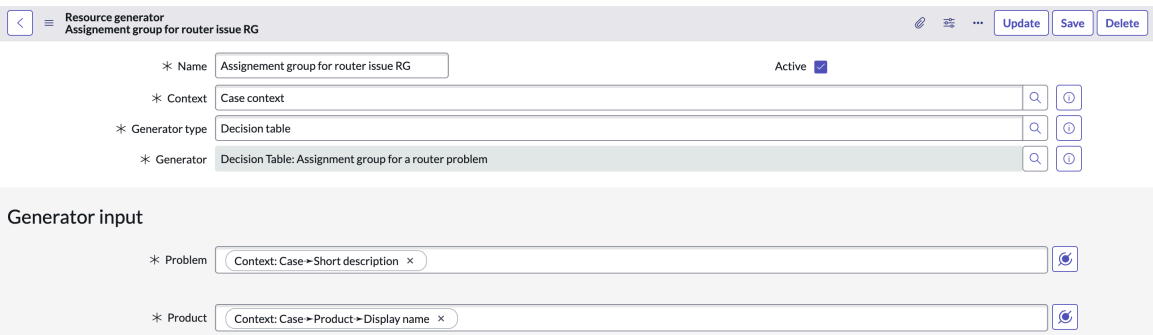
4. In the **Context** field, select Case context.
5. In the **Generator type** field, select Decision table.
6. In the **Generator** field, select the Assignment group for a router issue decision table.
7. Save the record to display the generator inputs.
8. On the Generator input form, fill in the fields.
   a. Select the pill picker next to the field.
   b. In the **Product** field, select **Context: Case** > **Product** > **Display name**.
   c. In the **Problem** field, select **Context: Case** > **Short description**.
9. Select **Update**.

Result



What to do next

Create a field recommendation that you can use while creating recommended action for recommending assignment group field value.

Create a field recommendation for recommending assignment group field value

Create a field recommendation that you can select when configuring a recommended action. This field recommendation suggests an assignment group field value on a case record for a router issue.

Before you begin

Use the CSM default record page or the CSM Interaction record page to display field recommendations in CSM Configurable Workspace. For setting the CSM default record page or the CSM Interaction record page as the default page, see Set record page order.

Role required: sn_nb_action.next_best_action_author, or admin

About this task

Creating a field recommendation involves two main steps:

- Creating inputs for the field recommendation.
- Creating instructions about how to recommend values by configuring a definition for each field.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Field Recommendations**.
2. Select **New** on the Field Recommendations list.
3. In the **Name** field, enter `Field recommendation for assignment group`.
4. In the **Table** field, select `Case [sn_customerservice_case]` so that you can populate field recommendation for the **Assignment group** field on a case record.

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5. Save the record to display the related lists.
6. In the Field Recommendation Inputs related list, select **New** to create an input.
   a. In the **Type** field, select Reference.
   b. In the **Label** field, enter `Assignment group`.
      The **Column name** field is auto-filled.
   c. In the Reference specification related list, configure the following fields.

Field	Action
Reference	Select the `Group [sys_user_group] table.`
Reference qual condition	Select the `Active | is | true` condition.

   d. Select **Update**.
7. In the Field recommendation definitions related list, select **New** to create a definition.
   a. In the **Name** field, enter `Assignment group for router issue definition`.
   b. In **Field**, select the Assignment group field.
   c. In the **Recommendation message** field, enter `You can assign this issue to` and use the pill-picker to add the recommended value **Field recommendation inputs** > **Assignment group** as part of the message.

      Note: If the resource generator returns an empty field value, the recommendation message isn't displayed.

   d. In the **Recommendation Method** list, select Recommend only.
   e. Select **Submit**.

Create a recommendation with the field recommendation as an action type

Create a recommendation to select the field recommendation as an action type for recommending a value for the Assignment group field on a case record.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select Case context.
3. In the Rules related list, select Active rule.
4. In the Recommendations related list, select **New**.
5. From the New Recommendation screen, select **A field value to use**.

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A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.

6. In the **Name** field, enter `Recommend assignment group for router issue`.
7. In the **Action** field, select an action.

   a. In the **Action** field, select the lookup icon.
   In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.

   b. In the **Document** field, select the Field recommendation for assignment group field recommendation.

   c. Select **OK**.

8. In the **Resource generator** field, select the Assignment group for router issue RG resource generator.
9. Save the record to display the Action inputs form section.
10. Define the action inputs.

    a. Select the pill picker next to the field.

    b. In the **Assignment group** field, select **Resource generator** > **Assignment group: Group**.

11. Select **Update**.

Example: Link the similar major case to the current case

Learn how process analysts or business owners configure a recommended action of type guidance to propose a major case that can be linked to the current case. This guidance uses a resource generator of type similarity with trend to recommend the similar case that has a common trend.

Problem scenario

Isabella owns a thriving E-commerce business that specializes in selling handmade artisanal products. As the business grows, Isabella recognizes the increasing importance of providing exceptional customer service to maintain customer satisfaction and loyalty. Isabella understands that addressing customer issues effectively and promptly is crucial for the success of the business.

Daniel, a process analyst on the Isabella's team identifies the most common and critical issues that their customers report and create major cases for them. So that whenever a customer creates a case, it can be linked to the similar major case. This process helps them understand the pattern, identify the root cause, take corrective actions, and apply similar solutions.

Daniel identifies the following major issues:

- Missing items in the order
- Wrong items received
- Damaged or defective products
- Refund requests
- Billing discrepancies or errors
- Difficulty applying discount codes
- Difficulty reaching customer support

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Now, Daniel configures a guidance that recommends a similar major case to the agent who is working on a new case created by a customer. The guidance provides an action to the agent to link the recommended major case to the current case.

Configuring a recommended action for linking the similar major case to the current case

Help Daniel configure a recommended action of type guidance that uses Similarity with Trend resource generator to link the major case to the current case.

Task	Description
Configuring a subflow for the guidance action automation	Configure a subflow that you can use in a guidance to link the proposed major case to the current case automatically on a click of an action button.
Configure a resource generator for providing a similar major case to the current case	Configure a resource generator of type similarity with trend that provides a similar major case to the current case.
Create a guidance for linking the similar major case to the current case	Create a guidance to link the similar major case to the current case by configuring guidance inputs, preview experience, and guidance action.
Create a rule from the Case context record	Create a rule to show recommendations for active cases that meet the condition specified in this rule.
Create a recommendation with guidance as an action type	Create a recommendation to select the Guidance as an action type for linking a major case to the current case record.

Configuring a subflow for the guidance action automation

Configure a subflow that you can use in a guidance to automatically link the proposed major case to the current case on a click of an action button.

Configure and publish a subflow with the following inputs and action. For more information, see Create a subflow in Workflow Studio.

Field	Value	Description
Name	Link major case	-
Subflow Inputs & Outputs > **Inputs**	• Current case • Major case	Input type: Re
Actions	Update Record	Update case r case as the pa

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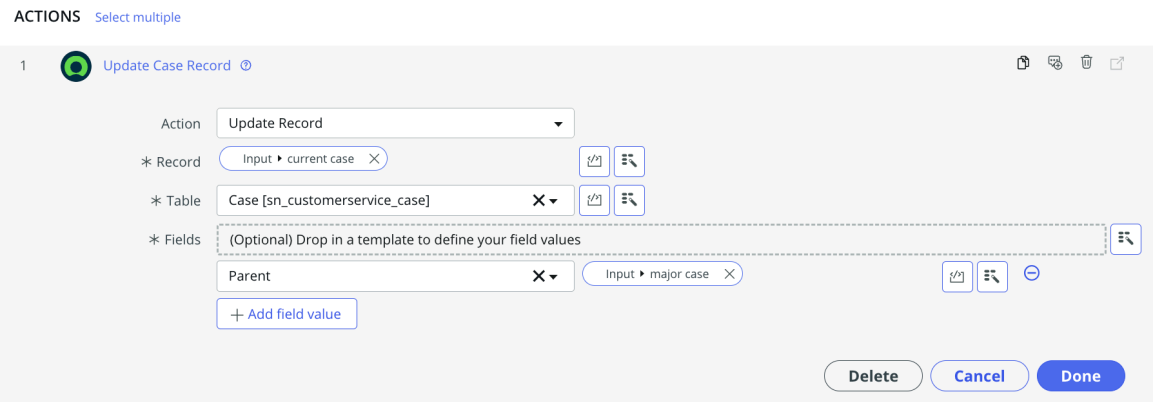

Configure a resource generator for providing a similar major case to the current case

Configure a resource generator of type similarity with trend that provides a similar major case to the current case.

Before you begin

- Ensure Predictive Intelligence is active and set up on your instance. See Install Predictive Intelligence.
- Ensure you have a Predictive Intelligence subscription.
- Train the Major issue detector similarity solution with the existing customer cases. For more information, see Create and train a similarity solution.
- Create a trend definition with the name Major issue trends to define how many records that have something in common constitute a trend, for example, six or more records with common field values.

Role required: sn_nb_action.next_best_action_author, sn_nb_action.resource_generator_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Resource Generators**.
2. Select **New** from the Resource Generators list.
3. In the **Name** field, enter `Similar major case`.
4. In the **Context** field, select Case context.
5. In the **Generator type** field, select Similarity with Trend.
6. Save the record to display the generator inputs.
7. On the Generator input form, fill in the fields.

Field	Action
Similarity definition	Select the similarity solution, Major Issue Detector.
Trend definition	Select the trend definition, Major issue trends.

8. Select **Update**.

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Create a guidance for linking the similar major case to the current case

Create a guidance for linking the similar major case to the current case by configuring guidance inputs, preview experience, and guidance action.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select **New** in the Guidances list.
3. In the **Name** field, enter `Link similar major case`.
4. In the **Description** field, enter `This guidance recommends to link the identified similar major case to the current case.`.
5. Create the following inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.
   a. In the Guidance Input tab, select **New**.
   b. In the **Label** field, enter `Current case`.
   c. In the **Type** field, select Reference.
   d. In the Reference Specification related list, in the **Reference** field, select the Case table.
   e. Select **Submit**.
   f. In the Guidance Input tab, select **New** again.
   g. In the **Label** field, enter `Major case`.
   h. In the **Type** field, select Reference.
   i. In the Reference Specification related list, in the **Reference** field, select the Case table.
   j. Select **Submit**.
6. Configure the preview experience.
   a. In the **Preview Title** field, enter `Link to this major case`.
   b. In the **Fields to display**, select the parent case input.
   c. In the **Message** field, enter `This is the similar Major case predicted that you can link to the current case.`
7. Save the guidance record to display the Guidance Actions related list.
8. Configure a guidance action.
   a. In the Guidance Actions form section, select **New**.
   b. In the **Action Label** field, enter `Link major case`.
   c. In the **Call to Action Label** field, enter `Link major case`.
   d. In the **Action Behaviour** field, select Single-click.
   e. In the **Guidance Action Automation** field, select the Link major case subflow.

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f. In the **Completion Message** field, enter `The suggested major case is linked!`

g. Save the record to display the flow inputs.

h. In the **Automation Flow Inputs** related list, fill in the fields.

Input	Action
current case	i. Select the pill picker next to the field. ii. Select **Guidance inputs** > **Current case**.
major case	i. Select the pill picker next to the field. ii. Select **Guidance inputs** > **Major case**.

Create a rule from the Case context record

Create a rule to show recommendations for active cases that meet the condition specified in this rule.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

About this task

New rules can only be created from context records.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select the Case context.
   The Case context is available by default.
3. In the Rules related list, select **New**.
4. In the **Name** field, enter `Active rule`.
5. In the **Roles** field, select the Edit User Roles icon and then select Customer service agent [sn_customerservice_agent] and Consumer service agent [sn_customerservice.consumer_agent].
   The selected user roles can see recommendations for this rule.
6. Select **Done** on the Roles pop-up window.
7. In the **Condition** field, use the condition builder to add the condition "Active | is | true".
   Agents can see recommendations for the records in the context table that meet this criteria.
8. **Optional:** Enable the **Apply to tables extended from the context table** check box, so that the rule and its recommendations are applied to tables that are extended from the context table.
   For more information, see Apply rules to tables extended from the context table.
9. In the **Field affecting this rule** field, select Short description from the slush bucket.
10. Select **Submit**.

Create a recommendation with guidance as an action type

Create a recommendation to select the Guidance as an action type for linking a major case to the current case record.

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Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select Case context.
3. In the Rules related list, select Active rule.
4. In the Recommendations related list, select **New**.
5. From the New Recommendation screen, select **A specific action to take or information to review**.
   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto populated.
6. In the **Name** field, enter `Link major case to current case`.
7. In the **Action** field, select an action.
   a. In the **Action** field, select the lookup icon.
      In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.
   b. In the **Document** field, select the Link similar major case guidance.
   c. Select **OK**.
8. In the **Resource generator** field, select the Similar major case resource generator.
9. Save the record to display the Action inputs form section.
10. Define the action inputs.
    a. Select the pill picker next to the field.
    b. In the **Assignment group** field, select **Resource generator** > **Assignment group: Group**.
11. In the **Action Inputs** related list, fill in the fields.

Input	Action
Current case	**a.** Select the pill picker next to the field. **b.** Select **Context: case**.
Major case	**a.** Select the pill picker next to the field. **b.** Select **Resource generator** > **Highest confidence record: case**.

12. Select **Update**.

Install the Recommended Actions application

You can install the Recommended Actions application (sn_cs_nb_action) if you have the admin role.

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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.
- Review the Recommended Actions application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

The following items are installed with Recommended Actions:

- Store applications: Recommended Actions
- Roles
- Tables

For more information, see Components installed with Recommended Actions.

To create recommendations based on Artificial Intelligence and Machine Learning models developed using ServiceNow® Predictive Intelligence, install Recommended Actions - Advanced.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Recommended Actions application (sn_nb_action) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Components installed with Recommended Actions

Several types of components are installed with the Recommended Actions application, including tables, roles, guidances, resource generators, and scheduled jobs.

Tables

The Recommended Actions application adds the metadata tables described in the following table.

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Tables installed with Recommended Actions

Table	Description
Context [sn_nb_action_rule_context]	Stores contexts for tables such as case, incident, and problem for which recommendations are generated.
Recommendation [sn_nb_action_recommended_action]	Stores recommendations, which include action type, action, and resource generator information.
Action Type Definition [sn_nb_action_type_definition]	Stores action type definitions such as guidances, guided decision trees, and field recommendations.
Field Recommendation [sn_nb_action_field_recommendation]	Stores field recommendations.
Field Recommendation Definition [sn_nb_action_field_recommendation_definition]	Stores field recommendation definitions.
Field Recommendation Input [sn_nb_action_field_recommendation_input]	Stores inputs for field recommendations.
Resource Generator [sn_nb_action_resource_generator]	Stores resource generators.
Resource Generator Type [sn_nb_action_resource_generator_type]	Stores resource generator types such as flow, decision table, scripting, similarity, similarity with trend, and classification.
Resource Generator Type Input [sn_nb_action_generator_type_input]	Stores inputs for resource generators types.
Trend Definition [sn_nb_action_trend_definition]	Stores trend definitions.
Rule [sn_nb_action_condition_based_rule]	Stores rules, which include a condition and roles for the context.
Recommended Action Rule [sn_nb_action_rule_base]	Stores recommended action rules records.
Conditional Rule [sn_nb_action_conditional_rule]	Stores conditional rules. This table is no longer supported.
Decision Table Rule [sn_nb_action_decision_table_rule]	Stores decision table rules. This table is no longer supported.

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Tables installed with Recommended Actions (continued)

Table	Description
Recommended Action Input Generator [sn_nb_action_input_generator]	Stores input generator records. This table is no longer supported.
Search result recommended action mapping [sn_nb_action_search_result_ra_mapping]	Stores mapping between search result outputs and action inputs.

Roles

The Recommended Actions application includes the roles described in the following table.

Roles installed with Recommended Actions

Role	Description	Contains roles
Recommended Actions admin [sn_nb_action.next_best_action_admin]	Grants administrator access to the Recommended Actions application.	sn_nb_action.next_best_action_author
Recommended Actions author [sn_nb_action.next_best_action_author]	Can create recommended actions.	• sn_nb_action.resource_generator_author • sn_gd_guidance.guidance_manager • sn_nb_action.next_best_action_user • sn_gd_core.decision_tree_author
Recommended Actions user [sn_nb_action.next_best_action_user]	Can use recommended actions.	sn_gd_core.decision_tree_author
Resource Generator author [sn_nb_action.resource_generator_author]	Grants access to configure resource generators.	• flow_operator • decision_table_reader • platform_ml_read • sn_nb_action.trend_definition_author • sn_ti_admin.tia_user
Trend Definition author [sn_nb_action.trend_definition_author]	Grants access to configure trend definitions.	None

Granular admin users can be granted delegated developer privileges and other required roles to manage and configure metadata in scoped applications instead of assigning high-privileged admin roles. By granting granular admin users with the Manage Update Set permission, you can allow them to create and manage records within a specific application scope and track those changes in the appropriate update set. The metadata_scope_viewer role allows these granular admins to view the Application field on metadata records within scoped applications. Other than the roles in the preceding table, you can delegate deployment tasks to developers or non-admin users. For more information on the delegated development, see Delegated Development.

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Guidances

The Recommended Actions application includes the guidances described in the following table.

Guidances installed with Recommended Actions

Guidance	Description
Apply resolution from a solved case	Enables agents to apply a resolution from a recommended solved case by clicking **Resolve case** button on a card, which copies the resolution notes and a resolution code from the solved case into the Closure Information section of the current case. The state of the current case changes to resolved.
Communicate Workaround	Enables agents to communicate a workaround from a recommended problem record by clicking a **Communicate workaround** button on a card, which opens the guidance in the side panel. The guidance shows the workaround from the problem record and provides a note field for the agent to add additional notes. The workaround and notes are added in the work notes and the problem record is linked to the current case.
Create case task	Enables agents to create a case task for the current case by clicking a **Create** button on a card, which opens the guidance in the side panel where the agent can enter a subject for a new case task and submit it.
Create Work Order	Enables agents to create a work order for a case by clicking a **Create** button on a card. Creates a work order task and opens the task in a subtab.
Link to existing defect	Enables agents to link an existing defect to the current case by clicking a **Link to defect** button on a card, which links the defect to the case and updates the work notes.
Link to existing open case	Enables agents to link the current case to an existing open case by clicking a **Link to this case** button on a card, which sets the open case as the parent of the current case.
Offer Recommendation	Enables agents to recommend upgrade of a product to provided product model.

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Guidances installed with Recommended Actions (continued)

Guidance	Description
Propose Resolution	Enables agents to enter resolution notes and a resolution code for a case by clicking a **Propose Solution** button on a card.
Read message to customer	Enables an agent to indicate that a message was read to a customer during a call by clicking the **Mark as read** button on a card, and adding the message to the work notes.
Reassign case	Enables agents to reassign the current case to a recommended assignment group by clicking the **Reassign** button on a card, which opens the guidance in a side panel where the agent can enter notes. The current case is reassigned to a different assignment group and the work notes are updated.
Review and attach article	Enables agents to review a recommended knowledge article in the contextual side panel by clicking a **Review and attach article** button on a card, which opens the article in the side panel. In the side panel, agents can do the following: • Review the article. • Attach the article to the case. • Mark the article as helpful. • Open the article in a subtab.

Resource generators

The Recommended Actions application includes the resource generators described in the following table.

Resource generators installed with Recommended Actions

Resource generator	Description
Find most read KB Article for Product	Finds the most read KB article for the selected product. You can use this KB article to attach to a case as a recommended action.
Find Matching PRB with workaround	Finds a matching problem record that has a workaround. You can propose to share the workaround from this case as a recommended action.
Find Matching PRB without workaround	Finds a matching problem record without a workaround. You can propose to link to this problem record as a recommended action.

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Configuring the Recommended Actions application

As an admin, configure the Recommended Actions application to display relevant actions to your agents based on a record context.

Recommended actions

You can configure recommended actions by following these steps.

Steps to configure Recommended Actions

Step	Description
Create a context	A context enables agents to see recommendations for records from a specific table, such as the Case table.
Create a context input	A context input enables you to associate entities beyond just the context table with a context ensuring that recommendations are updated dynamically as the context evolves. **Note:** This step is not mandatory.
Create a rule for a context	A rule is a set of conditions that applies to a context and determines when a recommended action appears. When you create a rule: • Select conditions that apply to the context table. • Select the roles that have access to the recommended actions. **Note:** New rules can only be created from within a context.
Create a recommendation for a rule	A recommendation is a way to suggest an action to an agent. Create a recommendation by selecting one of the recommendation types available on the New Recommendation screen: • Guidance • Guided decision tree • Field recommendation • Playbook **Note:** New recommendations can only be created from within a rule.

Action types

With the Recommended Actions application, you can create the following types of actions for agents to take.

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Action types in the Recommended Actions application

Action type	Description
Guidance	An action that an agent can take or information that they can share. For example, a guidance can recommend that an agent can view and attach a knowledge article to a case or create a work order.
Guided decision tree	A guided flow to follow. A decision tree is a multi-step process that includes a series of questions and answers and results in guidance.
Field recommendation	A recommended value to use for a field. For example, this type of action can recommend the assignment group based on the text in the case short description.
Playbook	An interactive, step-by-step guided workflow that helps agents make decisions and resolve issues. Playbooks appear as action cards in the Recommended Actions panel and can be launched inline without switching applications. For more information, see Playbooks in Recommended Actions.

For more information, see Creating guidance and field recommendation in Recommended Actions.

Resource generators

Configure resource generators to provide information that you can use as inputs to actions such as guidances and field recommendations. Configuration of decision trees don't require resource generators. For more information, see Create a resource generator in Recommended Actions.

Arbitration parameters

Configure arbitration parameters to determine the frequency of issues or the priority order of the recommended actions so that agents get the guidance that they must help resolve customer issues. For more information, see Configure the arbitration parameters in Recommended Actions.

Create a context in Recommended Actions

Create a context for an individual table, such as the Case table. Contexts store information including the recommended actions that agents can use and the rules that determine when those actions are available.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

A context enables agents to see recommendations for a specific type of record when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select **New** on the Contexts list.

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3. Fill in the fields on the form.

Context form

Field	Description
Name	Name for the context.
Table	Table for which the context applies to. If you select a table that already has a context, then a warning message is displayed.
Description	Brief description about the context.
Active (Optional)	Check box to make the context active.
Asynchronous Evaluation	When selected, enables asynchronous mode of evaluating recommendations on the contextual side panel in the CSM Workspace. That is, this mode enables agents to work on the case or incident record while the recommendations load on the contextual side panel. For more information, see Synchronous and asynchronous modes of evaluation for Recommended Actions.
Exclude fields	Fields of the context table that do not trigger the Recommendations refresh in the Configurable CSM Workspace, when these fields are updated. Add the context table fields that do not impact recommendations generation.
Parent Context Config	
Parent context	Enables you to choose which parent table's rules and recommendations must be applied to the context you are working with. **Note:** ○ This field appears when the selected table has a parent table with context defined. ○ This field does not show the parent context which have context inputs configured. ○ If parent context is set, the Context inputs related list does not appear.
Inherit exclusions from parent context	When selected, includes the exclusion fields of the parent context table to prevent the trigger of the Recommendations refresh in the CSM Configurable Workspace.

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Field	Description
	Note: This field appears only when a context is added in the Parent context field.
Contextual AI Search Config	
Search Application Configuration (Optional)	Search application configuration that specifies AI Search as the search engine and the settings to use for the search. You can configure the search result display and refinement settings in the search application configuration. For more information, see Search application configurations. The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace store application. To access this configuration, navigate to **AI Search** > **Search Experience** > **Search Applications**. For more information about AI search configurations, see Configuring AI Search in Recommended Actions.
Default search term	Search term that appears by default. You can map the context input from the pill picker.
Grouping strategy (Optional)	Strategy for grouping recommendations. For example, you can define a grouping strategy to group recommendations that have similar criteria. **Note:** You might need to configure the Context form to display the **Grouping strategy** field. This field is available by default for ITSM Workforce Optimization users.
Refresh interval (Optional)	This value determines how often recommendations are refreshed for the context. The default value for this field is 12 hours and the minimum value is 10 minutes. **Note:** You might need to configure the Context form to display the **Refresh interval** field.

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Field	Description
Show relevancy score for results	Displays the relevancy score on the search results and recommendations in the Recommended Actions contextual side panel.
Top N results	Limits the number of search results displayed in the AI search tab of Recommended Actions to the top N results for improved precision and easier management. The number of results that appear is determined by the **Search Results Limit** value which can be updated by opening the Search Application in the Search Application Configuration.

4. Select **Save**.
   After saving the context record, the system displays the Rules and Recommendations related lists.

What to do next

- Configure context inputs. For more information, see Create a context input in Recommended Actions.
- Use the Rules related list to view or create rules for this context. For more information on how to create a rule, Create a rule in Recommended Actions.
- Use the Recommendations related list to view the recommendations related to the context rules. You can only create a recommendation from within the rule. For more information on how to create a recommendation within a rule, see Create a recommendation in Recommended Actions.
- Use the Search result mapping related list to view or create mappings between AI search outputs and guidance inputs.

Related topics

Contexts in Recommended Actions

Create a context input in Recommended Actions

As an admin or RA author, create a context input for a context and use it in rule condition builder, resource generator input and recommendation-action mappings.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

After creating context inputs, you must configure the RA UIB component to pass the context input values. For more information, see Configuring Recommended Actions UIB component for context inputs.

Note:

Creating context inputs is not mandatory. You can create context inputs for a context only when you want to include or map parameters other than the context table.

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Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Open a context that you want to edit.
3. On the Context inputs related list, select **New**.

   Note: The Context inputs related list appears only when a parent context is not mapped to the context. For more information on the context input configuration limitations, see Context Input configuration limitations.

4. In the form, fill in the fields.

Field	Description
Type	Field type of the input such as Choice, Reference, String, List, Integer, etc. Depending on the field type that you select, you might need to configure additional settings in the related tabs. For example, if you select Reference as the field type, you need to select a reference table.
Application	Scoped application name. The applicable name is populated by default.
Mandatory	When this check box is selected, you must set the values for these contextual inputs directly on Recommended Actions component on the record page in the UI Builder for the recommendations to be generated. **Note:** If you select this check box and fail to set contextual inputs on Recommended Actions component in the UIB, the recommendations will not be generated.
Label	Name of the context input. The **Column name** field is auto-filled.
Active	Enabling the **Active** check box makes the context input available for use in the context.

5. Provide the necessary details in the related tabs.
   The related tabs that display vary based on the field type selected in the **Type** field. For more information on the data types, see Field types reference.
6. Select **Save**.

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Result
The context input appears in the appropriate fields of rules, recommendations, and resource generators.

- **Default search term** pill picker in the Contextual AI Search Config section of Context form.
- **Advanced Condition** drop-down field of the Rule form.
- Pill pickers in the Action inputs section of the Recommendation form.
- **Default search term** pill picker in the Contextual AI search configuration section of the Context form.
- Pill pickers in the Generator inputs section of the Resource generator form.

What to do next
Use the context inputs for creating the conditions in rules, and action inputs in recommendations and generator inputs in resources generators.

Create a rule in Recommended Actions

Create a rule for a context that determines when recommended actions are made available to agents.

Before you begin
Role required: sn_nb_action.next_best_action_author, or admin

About this task
New rules can be created from the context records only.

Procedure
1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select a context.
3. In the Rules related list, click **New**.
4. Select the rule that you want to update.
5. Enter a name and a description for the rule.
6. In the **Roles** field, select the user roles that can see recommendations for this rule.
7. Click **Done** on the Roles pop-up window.
8. In the **Advanced Condition** field, use the condition builder to add one or more conditions that apply to the records for this context.
   Agents can see recommendations for the records in the context table that meet this criteria.

   If a context input is available for the context, you can build conditions on it along with the context table.
9. **Optional:** Enable the **Apply to tables extended from the context table** check box, so that the rule and its recommendations are applied to tables that are extended from the context table. For more information, see Apply rules to tables extended from the context table.
10. In the **Fields affecting this rule** field, add fields from the context table that must be monitored for changes.
    Changes to these fields generate recommended actions of the type field recommendation for unsaved records.
11. Fill in the remaining fields on the form, as needed.
    For more information about these fields, see Rule form.
12. Click **Submit**.

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Create a recommendation in Recommended Actions

Create a recommendation with an action type of guidance, field recommendation, or guided decision tree to suggest helpful actions to agents.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

You select an action type and action as part of creating a recommendation. The next steps depend on the action type that you select. For example, guidances and field recommendations need action inputs as a next step, while guided decision trees don't.

For the AI search resource generator, you can select guidances only as action types in the Search result mapping related list. You must map the fields from the search source table with guidance action inputs for AI search or fields from the genius result configuration with guidance action inputs for genius results.

Then you define the action inputs, which are the parameters that enable agents to complete an action. You can select static values for inputs or use a resource generator to supply values.

Note: New recommendations can only be created inside the rules.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select a context.
3. Select a rule in the Rules related list.
4. In the Recommendations related list, select **New**.
5. Select the type of recommendation to create from the New Recommendation screen.
   - A specific action to take or information to review (guidance)
   - A guided flow to follow (guided decision tree)
   - A field value to use (field value recommendation)
   - A playbook to run for step-by-step resolution

   A new Recommendation form is displayed with the **Rule**, **Context**, and **Action type** fields auto-populated.
6. In the **Name** field, enter a name for the recommendation.
7. In the **Action** field, select an action.
   The available actions are determined by the selection in the **Action type** field.

   a. In the **Action** field, select the lookup icon.
      In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.

   b. In the **Document** field, select the desired action by clicking the lookup icon.
      You can also create an action of type guidance, field recommendation, or guided decision tree. For more information, see Creating guidance and field recommendation in Recommended Actions.

   c. Select **OK**.

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d. Save the record to display the Action inputs form section.
After selecting the action type and action, saving the record displays the required action inputs.

8. **Optional:** In the **Resource generator** field, select or create a resource generator and then save the record.

   (Optional) For more information, see Create a resource generator in Recommended Actions. Guidances and field value recommendations can use resource generators to find relevant resources for the action inputs.

   The **Action type**, **Action**, and **Recommendation hint** fields are not available for AI search resource generator. You can select the action type as a guidance and an action when you configure the search result mapping for AI search. For more information, see Map AI search results with guidance inputs in Recommended Actions.

9. For guidances and guided decision trees: in the **Recommendation hint** field, enter a hint text. The hint explains to agents why a recommendation is being suggested.
10. **Optional:** Select a group in the **Group** field to show relevant recommendations together.

   Note: You might need to configure the Recommendation form to display the **Group** field. This field is available by default for ITSM Workforce Optimization users.

11. Define the action inputs.
   Action types and actions need inputs. These parameters enable agents to complete an action. You can choose static values for action inputs or you can use a resource generator to supply values.

Option	Description
Use a static value	Enter the value in the field in the input field or use the lookup icon to select a value from the list.
Use a pill picker	**a.** Select the pill picker next to the field. ▪ The context is available in the pill picker. ▪ If you selected a **Resource generator**, the outputs from the generator are avail able in the pill picker. ▪ If an active context input is available for a context, the context input appears in the pill picker. **b.** Select the outputs from the pill picker.

12. Select **Update**.

Creating guidance and field recommendation in Recommended Actions

Create guidances and field recommendations that you can use to configure recommended actions.

Configuring guidances

When you create a guidance, you configure several different aspects of that guidance:

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Guidance configuration steps

Feature	Description
Configure inputs and outputs for a guidance.	• Inputs: The variables or information that the system must perform the guidance. • Outputs: the result of the guidance.
Configure a preview experience for a guidance.	A preview on the card that is displayed to the agent can include: • A hint that briefly tells the agent what the guidance is about • A preview message that describes the guidance in more detail • The action that the agent can take
Configure a detail experience for a guidance.	A detailed message that is displayed for guidances that open in the contextual side panel or in a subtab.
Configure a primary call to action for a guidance.	A guidance can have multiple actions, with one identified as the primary action and optional secondary actions.
Configure the behavior of a guidance.	Determines how the system executes a primary action after the agent selects the action button on the card. • **Single click**: Initiates and completes the action and moves the card to the History tab in the Recommended Actions panel. This behavior is useful for simple actions such as escalating a case. • **Open in the contextual side panel**: Expands the action and displays information about that action in the Recommended Actions panel. This behavior is useful for actions such as reviewing the content in an article before attaching it to a case. • **Open in a sub tab**: Opens the action in a subtab under the case tab. This behavior is useful for guidances that require the agent to select and submit additional information, such as filling out the fields on a form.
Customize the preview experience and the detail experience of a guidance	Options to customize the following items in the UI Builder: • **Preview experience**: The preview of the recommendation card includes a hint, an icon, a message, and an action button.

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Guidance configuration steps (continued)

Feature	Description
	The preview of the card shows up in the contextual side panel. • **Detail experience**: The detail experience of the guidance includes the drill down actions. It opens in the contextual side panel or in a subtab.

Configuring field recommendations

Field recommendation suggests a value for a field in the record form. Creating a field recommendation involves two main steps:

- Selecting the inputs for the recommendation.
- Creating the instructions about how to use those inputs.

Create a field recommendation in Recommended Actions

Create a field recommendation that you can select when configuring a recommended action. Field recommendations auto-fill a value or suggest a value for a field. For example, this type of action can recommend the assignment group based on the text in the case short description.

Before you begin

Use the CSM default record page or the CSM Interaction record page to display field recommendations in CSM Configurable Workspace. For setting the CSM default record page or the CSM Interaction record page as default page, see Set record page order.

Role required: sn_nb_action.next_best_action_author, admin

About this task

Creating a field recommendation involves two main steps:

- Creating inputs for the field recommendation.
- Creating instructions about how to recommend values by configuring a definition for each field.

Depending on the configuration, the recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field values are shown as messages only underneath the fields for the existing records. For an example implementation of field recommendation setup, see Create a field recommendation for recommending assignment group field value.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Field Recommendations**.
2. Click **New** on the Field Recommendations list.
3. In the **Name** field, enter a name for the field recommendation.
4. In the **Table** field, select a table.
   This table includes the field for which you're configuring a recommended value.
5. Save the record to display the related lists.
6. In the Field Recommendation Inputs related list, select **New** to create an input.

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a. In the **Type** field, select the field type for the input.

b. In the **Label** field, enter a label for the input.

c. In the **Column name** field, enter a column name.
This name should use lower case letters and underscores. For example, `confidence_score`.

d. Configure the settings for the input in the related lists.
These settings and related lists are determined by the selection in the **Type** field. For example, if you select Reference as the input type, you must configure:

- The table and any conditions for the reference field.
- The type of list to use.
- A default value.

e. Click **Submit**.

7. In the Field recommendation definitions related list, select **New** to create a definition.

a. In the **Name** field, enter a name for the definition.

b. Select the **Field** to be recommended and save the record to see additional details.

c. In the **Recommendation message** field, add the message that is recommended underneath the field on the form.
You can include the recommended value as part of the message by using the pill-picker.

> **Note:** If the resource generator returns an empty field value, the recommendation message is not displayed.

d. In the **Recommended value** field, use the pill-picker to select a value.

e. In the **Recommendation Method** list, select one of the options that auto-fills the value or recommends the value as a message.

Recommendation Method list fields and descriptions

Field	Description
Recommend only	Displays a recommendation message for the field.
Autofill as per the confidence threshold	▪ **Confidence**: Field that provides the confidence score. Enter a static value or use the pill-picker to select an input that you configured in the Field recommendation inputs related list. ▪ **Confidence threshold for direct assignment**: Confidence threshold for the recommendation. If the confidence

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Field	Description
	score is more than the threshold value, the recommended value is auto-filled. Otherwise, a message is displayed.
Autofill as per the resource generator preference	**Recommendation Preference**: Field that has "true" or "false" value for preference. If this value is true, the recommended value for the field is auto-filled. Otherwise, a message is displayed. Enter a static value or use the pill-picker to select an input that you configured in the Field recommendation inputs related list.

f. Click **Submit**.

Create a guidance in Recommended Actions

Create a guidance that you can select when creating a recommendation in Recommended Actions.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Create a guidance.

   a. Select **New** in the Guidances list.

   b. In the **Name** field, enter a name for the guidance.

   c. In the **Description** field, enter a brief description of the guidance.

   d. **Optional:** Make the guidance available to multiple agents working on the case by selecting the **Action available to multiple users** check box.
   When this option isn't selected, only one agent can work on any guidance. When the first agent works on the guidance and the state is in-progress, completed, or error, the other agents can't see this guidance.

   e. **Optional:** Select **Allow users to re-run the guidance** to enable agents to go back to the previous node or edit the previous nodes in the runtime experience of a decision tree.
   This field is only displayed when the Guided Decisions Experience plugin (sn_ga_exp) is installed.

   f. **Optional:** Select **Hide completed guidance** to hide the guidance recommended for a case resolution.
   In other words, the completed guidance in the View my response section of a Decision Tree is not displayed for the agent.

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> **Note:** This field is visible only when the Guided Decision Experience plugin is installed. You may need to configure the form to add this field.

g. Select **Submit**.

3. Open the guidance that you want to update.
4. Create one or more inputs for the guidance.
   Inputs are the variables or information that the system needs to perform the guidance. You can use inputs in multiple places such as the guidance preview experience and the guidance actions.

   a. In the Guidance Input tab, select **New**.

   b. In the **Label** field, enter a name for the input.

   c. In the **Type** field, select the field type of the input.
      Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.

   d. If the guidance input requires an action by the agent, such as adding information to a field, select the **Is form field** check box.

   e. **Optional:** Enter a **Default value**.

   f. Select **Submit**.

5. **Optional:** Create one or more outputs for the guidance.
   Outputs are the desired result of the guidance action. For example, if a guidance action creates a case task, the output of that action can return a reference to the case task that was created.

   a. In the Guidance Output tab, select **New**.

   b. In the **Label** field, enter a name for the output.

   c. In the **Type** field, select the field type of the output.
      Depending on the field type that you select, you might need to configure additional settings. For example, if you select Reference as the field type, you need to select a reference table.

   d. **Optional:** Enter a **Default value**.

   e. Select **Submit**.

6. Configure the detail experience for the guidance in the Detail Experience tab.
   The detail experience is a message that is displayed for guidances that opens in the contextual side panel or in a subtab.

   a. In the **Title** field, add a title for the guidance in the detailed view.

   b. In the **Guidance Message** field, provide a message for the detail view.

7. Select **Submit**.

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Configure guidance actions in Recommended Actions

Configure the actions that an agent can perform for a Recommended Actions guidance.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the Guidances list.
3. In the Guidance Actions form section, click **New**.
4. On the Guidance Action form, fill in the fields.

Field names on the Guidance Action form

Field	Description
Guidance	The guidance that this action is associated with. This field is read only.
Action label	A name for this guidance action.
Call to Action Label	The label for the action button that appears on the recommendation card in the contextual side panel. For example, **Review and attach article** or **Propose Solution**.
Action Behavior	The selected behavior for the guidance action: ○ **Single click**: The action is initiated and completed with one click and the card moves to the **History** tab in the side panel. Useful for simple actions such as escalating a case. ○ **Open in Contextual Side Panel**: The action opens in a detailed view within the side panel. The agent can review the details in the side panel, such as reviewing the content of a knowledge base article. ○ **Open in Sub Tab**: The action opens in a separate tab. **Note:** Actions that open in the contextual side panel or in the subtab don't move to the in-progress state. The action moves to the in-progress or completed state only when the agent clicks the action button in the detail view.
Primary	Denotes the guidance action as a primary action. This field is enabled by default. A primary action highlights the action that the agent should take and makes that action available as a button on the recommendation card. **Note:** A guidance can have only one primary guidance action.

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Field	Description
	If this field is not selected, the guidance action is a secondary action available through the more actions menu on the recommendation card.
Application	The application that this guidance action is associated with. This field is read only.
Guidance Action Automation	The flow associated with this guidance action.
Order	The order of the action.
Completion Message	The message that appears at the top of the recommendation card when the guidance action is complete. For example, **KB article was shared**.

5. Depending on the selected flow in the **Guidance Action Automation** field, you can configure flow inputs and guidance outputs.
   - Configure flow inputs in the **Automation Flow Inputs** tab.
   - Configure outputs in the **Guidance Outputs** tab.

     These fields can contain static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content. To use dynamic content, select the pill picker icon next to the field and select a guidance input from the list.
6. Click **Submit**.

Configure a guidance preview experience

Configure a preview experience that conveys relevant information about the guidance action to the agent before a recommendation is triggered. This information appears on the Recommended Actions card in the contextual side panel.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

About this task

A guidance preview includes the following elements:

- A title
- Fields to display
- A message made up of text and HTML content, including images, videos, and links

You must configure at least one of these elements to save the guidance preview. This action prevents the guidance from appearing empty in the contextual side panel.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the **Guidances** list.
3. Select the **Preview Experience** tab.
4. In the **Preview Title** field, add a title for the guidance preview.

   This field can contain static text, dynamic content (field values from guidance inputs), or a combination of static text and dynamic content. To select dynamic content as a field value:

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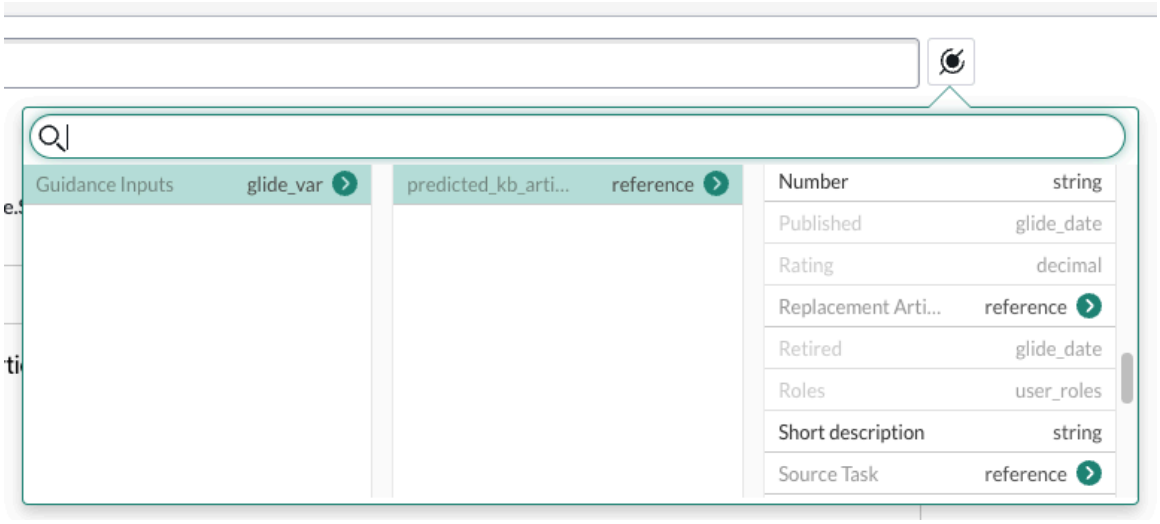
a. Select the pill picker icon next to the **Preview Title** field.

b. Select a guidance input from the list. You can drill down to another level to find the input you want.



5. Select fields to display in the guidance preview.

   a. In the **Fields To Display** field, click the lock icon to unlock the field.

   b. Move the required fields from the **Available** column to the **Selected** column.
   You can select up to four fields.

   c. Use the up and down arrows to arrange the selected fields.

   d. Select the lock icon again to lock the field.

6. In the **Message** field, create a message for the guidance preview.
   You can use the tools available in the rich text editor to create and format the message. This field can include text and HTML content like images, videos, and links.

7. Select **Submit**.

Customize a guidance preview experience in the UI Builder

Customize a preview of a Recommended Actions card that displays in the contextual side panel using UI Builder. The preview experience includes a hint, an icon, a message, and an action button.

Before you begin

Role required: sn_nb_action.next_best_action_author and ui_builder_admin, admin

About this task

You begin by creating a UI page variant of a guidance preview experience. When you create a UI page variant from a page template, you start with a base structure that you can customize. By using the component properties, you can change how your recommendation card preview looks.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.

2. Select a guidance from the Guidances list.

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3. Select **Create preview UI** to create a UI page variant of a guidance preview experience.

   This page includes an empty `customExpProps` container with the properties listed in the following table during run-time. The Recommended Actions framework passes the `customExpProps` object as a property to the custom experience.

Preview experience properties

Property	Description
sysId	ID of the recommendation.
name	Title of the preview experience.
description	Message for the preview experience.
recommendationHint	Text that tells the agent why a recommendation is being suggested.
callToActions	Settings for the guidance action.
actionTypeLabel	Label for the recommended action type.
icon	Icon for the recommendation card.
actionStateLabel	External name of the action state.
actionStateValue	Internal name of the action state.
previewFields	The fields to display in the guidance preview experience.
errorMessage	Error message to display when the recommendation fails to display.
ariaHidden	On the Recommended Actions grouped list, the sn-carousel component passes this property to each card to determine if the content is hidden within the carousel. If the card is hidden, you can use this value to set aria-hidden or disable any actionable component to true and avoid accessibility issues.
useCase	Search/RA tab where the guidance is getting rendered.
actionInputs	Guidance Inputs.
actionTypeSysId	Sys Id of the recommendation type.
actionId	Sys Id of the recommendation.
table	Recommended Actions Context table.
tableSysId	Recommended Actions Context table record sys_id.
renderer	Component responsible to render the detailed experience
secondaryCallToAction	Secondary actions to be shown on card.
isGenius	Is genius result card, used in Search tab genius result.
contextSysId	Recommended Actions context sysId.
actionConfigurations	Recommended Actions actionConfigurations property value. The Value field is empty by default.
isFullSearchView	If search displayed in full search view of side panel view, the value is true.

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Property	Description
contextInputs	Recommended Actions contextInput property value. To get the predefined syntax, navigate to **All >** > **Recommended Actions** > **Context** > **Context Inputs** and copy the JSON format of the context inputs.
Search relevancy score	Relevancy score of a search result which displays on the on the guidance card when the use case is `search` but not suggested actions. If the value is null or undefined, the relevancy score component is hidden on the guidance card.

The following example shows properties and sample values for the preview experience.

```
"customExpProps": {
        "sysId": "e8421a2a436f0210f81d92621ab8f2da",
        "name": "Attach and share article",
        "description": null,
        "recommendationHint": "Knowledge",
        "callToActions": [
            {
                "label": "",
                "name": "",
                "id": "1e8392aa436f0210f81d92621ab8f291",
                "actionBehavior": "contextual_side_panel",
                "primary": "true",
                "order": "100",
                "completionMessage": "Knowledge article
 successfully attached."
            }
        ],
        "recommendationAction": "",
        "actionTypeLabel": "Guidance",
        "icon": "magnifying-glass-sparkle-outline",
        "actionStateLabel": "New",
        "actionStateValue": "new",
        "previewFields": null,
        "attributes": "",
        "errorMessage": "",
        "ariaHidden": false,
        "useCase": "search",
        "actionInputs": {},
        "actionTypeSysId": "",
        "actionId": "",
        "table": "sn_customerservice_case",
        "tableSysId": "",
        "renderer": "sn-guidance-experience-connected",
        "secondaryCallToAction": {},
        "isGenius": false,
        "contextSysId": "",
        "actionConfigurations": {},
        "isFullSearchView": false
    }
```

4. Select **Edit preview in UI Builder**.

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The UI page variant opens in UI Builder, where you can add and configure components to customize the look and feel of the preview experience. For more information, see Working with components in the UI Builder.

5. Bind the preview experience properties to your preview UI.
   Data bindings are in the **Config** tab of the configuration panel in UI Builder. For more information, see Data resources in UI Builder.
6. Add and bind scripts to components in your preview UI to dispatch events by using an event handler to execute or skip a recommendation with a corresponding payload.

   The following table shows the list of events that are emitted with respect to the actions perform by an agent:

Preview experience events

Events handled	Description

ON_SINGLE_CLICK_ACTION_INITIATE	Initiates and completes the action when an agent selects the action button. This event passes the following parameters in the payload:
	`api.emit(`
	`'ON_SINGLE_CLICK_ACTION_INITIATE', {`
	`sysId: api.context.props.customExpProps.sysId,`
	`name: api.context.props.customExpProps.name,`
	`actionStateValue: api.context.props.customExpProps.actionStateValue,`
	`actionMetadata: api.context.props.customExpProps.callToActions[0] ,`
	`table: api.context.props.customExpProps.table,`
	`tableSysId: api.context.props.customExpProps.tableSysId,`
	`contextSysId: api.context.props.customExpProps.contextSysId,`
	`actionType: api.context.props.customExpProps.actionTypeSysId,`
	`actionInputs: api.context.props.customExpProps.actionInputs,`
	`formFieldInputs: { <actionInputs key>: <actionInputs value> },`

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Events handled	Description
| | ```
        actionId:
 api.context.props.customExpP
rops.actionId,
        name:
 api.context.props.customExpP
rops.name,
        actionMetadata:
 api.context.props.customExpP
rops.callToActions[0],
        actionStateValue:
 api.context.props.customExpP
rops.actionStateValue,
    }
)
```<br>The `formFieldInputs` contains the `actionInputs`, which must be updated when the event is emitted. |
| ON_DRILL_DOWN_ACTION_INITIATE | Expands the action and displays more actions or information after an agent selects the primary action button. This event passes the following parameters in the payload:```
api.emit(

 'ON_DRILL_DOWN_ACTION_INITI
ATE ', {
          table:
 api.context.props.customExpP
rops.table,
          tableSysId:
 api.context.props.customExpP
rops.tableSysId,
          actionType: <sys_id
 for "Guidance" action type/
 e38f55b9b72120107d472397ee11
a9be>,
          actionInputs:
 api.context.props.customExpP
rops.actionInputs,
          formFieldInputs:
 {"<actionInputs Key>":"<new
 value which needs to be
 set>"},
          actionId:
 api.context.props.customExpP
rops.actionId,
          sysId:
 api.context.props.customExpP
rops.sysId,
          name:
 api.context.props.customExpP
rops.name,
``` |

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Events handled	Description
	`actionStateValue: api.context.props.customExpProps.actionStateValue, actionMetadata: api.context.props.customExpProps.callToActions[0], renderer: api.context.props.customExpProps.renderer, contextSysId: api.context.props.customExpProps.contextSysId, sysId: api.context.props.customExpProps.sysId, name: api.context.props.customExpProps.name }`  `)`
DISMISS_ACTION_CLICK	Cancels the action. `api.emit( 'DISMISS_ACTION_CLICK', { sysId: api.context.props.customExpProps.sysId } )`
ACTION_TRIGGERED_PROPAGATION	Enables user to add UI-specific behavior for guidance actions. This event propagates the payload details to the parent where this event can be handled. `api.emit('SN_NEXT_BEST_ACTION_LIST_CONNECTED#ACTION_TRIGGERED_PROPAGATION' ', { "actionSysId": api.context.props.customExpProps.actionId "actionName": api.context.props.customExpProps.actionConfigurations[api.context.props.customExpProps.actionId][“actionName”] "actionType": "guidance", "eventName": "<eventName>", "payload": { } }`

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Events handled	Description
LOG_SEARCH_RESULT_EVENT	Adds the search result logs to the Queued Signal Events [sys_signal_event_queue] table. `api.emit(LOG_SEARCH_RESULT_EVENT, {actionData: {actionName: actionId}})`

For more information, see Define and bind client scripts to components.

Customize a guidance detail experience in the UI Builder

Customize how your detail experience looks in the contextual side panel or in a subtab of the Recommended Actions card using UI Builder. The detail experience can include things such as user inputs and drill down actions.

Before you begin

Role required: sn_nb_action.next_best_action_author and ui_builder_admin, admin

About this task

You begin by creating a UI page variant of a guidance detail experience. When you create a UI page variant from a page template, you start with a base structure that you can customize. By configuring the components and using the component properties, you can change how your detail experience looks in the contextual side panel or in a subtab.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Action Types** > **Guidances**.
2. Select a guidance from the Guidances list.
3. Select **Create detail UI** to create a UI page variant of a guidance detail experience.
   This page includes an empty container with the properties listed in the following table.

Detail experience properties

Property	Description
guidanceInputs	The inputs required to perform the guidance.
guidanceOutputs	The outputs of the guidance.
status	The status of the guidance.
guidanceMessage	The message for the detail experience.
guidanceActions	The guidance actions in the detail view.
errorMessages	The error message to display when the recommendation fails to display.

The following example shows properties and their sample values for the detail experience.

```
{
    "guidanceInputs": {},
    "guidanceOutputs": {
        "meta": []
    },
    "status": "waiting",
    "guidanceMessage": "",
```

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```
    "guidanceActions": [
        {
            "label": "Attach",
            "action_sys_id":
 "1e8392aa436f0210f81d92621ab8f291",
            "variant": "primary",
            "isExecuted": false,
            "completionMessage": "Knowledge article
 successfully attached.",
            "action_behaviour": "contextual_side_panel",
            "primary": true
        }
    ],
    "errorMessage": "",
    "actionConfigurations": {},
    "guidanceId": "",
    "tableName": "sn_customerservice_case",
    "bare": true,
    "scrollable": "none"
}
```

4. Select **Edit detail in UI Builder**.
   The UI page variant opens in UI Builder, where you can add and configure components to customize the look and feel of the detail experience. For more information, see Working with components in the UI Builder.
5. Bind the preview experience properties to your custom detail UI.
   Data bindings are located in the **Config** tab of the configuration panel in UI Builder. For more information, see Data resources in UI Builder.
6. Add and bind scripts to components in your custom detail UI to dispatch events by using an event handler to execute, skip, or mark complete a recommendation with a corresponding payload.

Detail experience events

Events handled	Description

GUIDANCE_ACTION_CLICKED	The action that is selected. This event passes the action selected to the payload.
	`api.emit(`
	`  'GUIDANCE_ACTION_CLICKED',{`
	`  model: {`
	`  fields: [{'name': 'input',`
	`  'value': '100'}]`
	`  },`
	`  action: api.context.props.guidanceActions.find(action => action.label == "guidance action label");`
	`  }`
	`);`

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Events handled	Description
	Note: In the `guidanceActions[n]` property in the response, provide the index number of the action that you want to apply.
SKIP_GUIDANCE	Skips the guidance. `api.emit( ‘SKIP_GUIDANCE’ );`
GUIDANCE_MESSAGE_PUBLISHED	Passes data to an upstream application. `api.emit( ‘SN_GUIDANCE_EXPERIENCE_CONNECTED#GUIDANCE_MESSAGE_PUBLISHED’, { name:'decision-tree-payload' jsonPayload: jsonObject } );`
GUIDANCE_MARK_COMPLETE	Marks a custom guidance as completed. `api.emit( 'GUIDANCE_MARK_COMPLETE' );`
GO_BACK_GUIDANCE	Goes back to the previous node in a decision tree. `api.emit( ‘GO_BACK_GUIDANCE’ );`
ACTION_TRIGGERED_PROPAGATION	Enables you to add UI specific behavior for guidance actions. This event propagates the payload details to the parent where this event can be handled. `api.emit( ‘SN_NEXT_BEST_ACTION_LIST_CONNECTED#ACTION_TRIGGERED’, { "actionSysId":api.context.props.guidanceId, "actionName": api.context.props.actionConfigurations[api.context.props.guidanceId][“actionName”] "actionType": "guidance", "eventName": "<eventName>", "payload": {}`

For more information, see Define and bind client scripts to components.

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Configure a playbook as a Recommended Actions

Add a playbook as a recommended action type in the authoring interface, then select and configure the playbook with its required inputs.

Before you begin

One or more playbooks must already be published and active in your instance.

Role required: RA author

About this task

Playbooks deliver step-by-step guidance directly within the Recommended Actions panel. As an author, you can select any published playbook and add it as a recommended action type. You can then configure the playbook's required inputs so that it has the correct context when an agent launches it.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**
2. Open a context from the list and then open a rule in the context.
3. Select or create a recommended action rule.
   You can add a playbook to a new or existing rule configuration.
4. In the Action type drop-down, select **Playbook**.
   The system displays a new section for playbook configuration.
5. Select a playbook from the available list.

   Only active and published playbooks appear in this list.

   Note: If you don't see a playbook you expect, verify it is published and active in the Playbook application.

6. Configure the playbook's required inputs.

   Each playbook may have required input fields. Fill in or map values for these inputs so the playbook has the correct context when launched.

7. Configure the playbook launch mode (optional).

   Choose how the playbook should launch when an agent clicks the action:

   - **Launch and Show** — Opens the playbook in a side panel or new tab
   - **Launch Only** — Emits an event without rendering the playbook UI

   Default is **Launch and Show**.

8. Save the recommended action configuration.
   The system validates and saves your playbook action configuration. The playbook is now available as a recommended action to users who match the rule criteria.

Result

The playbook is successfully added as a recommended action type and configured with its required inputs. Agents now see the playbook as an action card in the Recommended Actions panel when the rule matches their context.

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What to do next

Monitor how agents interact with the recommended playbook action. You can review execution history to see which playbooks are most frequently used and which might need adjustment.

Create a resource generator in Recommended Actions

Create resource generators that you can use to provide resources for recommendations from Recommended Actions.

Before you begin

The Task Intelligence Admin Console (com.sn_ti_admin) plugin must be installed for selecting the Task Intelligence Classification resource generator type.

Role required: sn_nb_action.next_best_action_author, sn_nb_action.resource_generator_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Resource Generators**.
2. Select **New** from the Resource Generators list.
3. In the **Name** field, enter a name for the resource generator.
4. In the **Context** field, select a context.
5. In the **Generator type** field, select a generator type.
   Different types of generators are available that you can use. Some of the generator types require an additional selection in the **Generator** field.

   For example, if you choose flow as the generator type, you must also select the specific flow to use. Selecting the lookup icon opens a pop-up window that you can use to select the required flow.

   For more information, see Resource generator types.
6. If applicable, in the **Generator** field, select a generator.
7. Save the record.
8. On the Generator input form, fill in the fields.
   For a description of the field values, see Resource generator inputs form.

   The fields that appear in this form section are determined by the selections in the **Generator type** and **Generator** fields.
9. Select **Update**.

Resource generator inputs form

The form provides information about the generator type and generator inputs.

Resource Generators form fields

The Task Intelligence Admin Console (com.sn_ti_admin) plugin must be installed for selecting the Task Intelligence Classification resource generator type.

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Note:

- You can enter static values for the generator input fields. If the **Generator type** is Flow or Decision table, you can use the pill picker to select dynamic values. The context record is available for selection in the pill picker.
- If a context input is defined for a context, it appears in the pill picker for selection. The context inputs are supported for Flow and Decision table generator types only.

Generator input form

Generator type	Generator inputs	Description
Flow	Generator	The subflow for the resource generator.
	Inputs for flow	Inputs for the selected subflow.
Decision table	Generator	The decision table for the resource generator.
	Inputs for decision table	Inputs for the selected decision table.
Similarity	Similarity definitions	The similarity solution definition to find records that are relevant to the context record.
	Top N Results	The number of records to return from the most relevant records found by the similarity solution definition.
Scripting	Script include	The script include record, which is an implementation of the ScriptingGeneratorFactory template. **Note:** To access the script includes, you must have the script_include_admin role.
AI search	Search field	The context field on which the AI search is performed.
	Top N results	The number of records to return from the AI search.
Similarity with Trend	Similarity definitions	The similarity solution definition to find records that are relevant to the context record.
	Trend definitions	The trend definition you want to associate with this solution definition.
Classification	Classification definition	The classification definition with a classification solution to return the predicted values or record references for a field on a table.
	Top N Results	The number of values or records to return from the values or records predicted by the classification definition.
Task Intelligence Classification	Solution	The solution record that contains configuration for recommended input

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Generator input form (continued)

Generator type	Generator inputs	Description
		fields and recommended output fields for prediction. The solution also contains preferences whether the fields are auto-filled or recommendation messages are displayed.
	Top N Results	The number of values or records to return from the relevant records predicted by the solution definition.

Configure the arbitration parameters in Recommended Actions

Configure the recommended actions by the frequency of issues or by the order of priority so that your agents get the guidance that they must help resolve customer issues.

Before you begin

Role required: sn_nb_action.next_best_action_author

About this task

A mathematical formula determines the priority of the recommended actions that are displayed to the agents. For most cases, you should use the default values to ensure that the relevant recommended actions are available for a given context. If you want to alter the frequencies, you can modify the values.

The recommended actions in the New state appear by ranking. For example, the score for these actions is calculated by the order of frequency and the priority order of the rule.

Procedure

1. Navigate to **All** > **Recommended Actions** > **Arbitration Configuration**.
2. On the Arbitration Configuration form, fill in the fields.

Arbitration Configuration form

Field	Description
Rule Order Weight (sn_nb_action.rule_order_weight)	Weight given to an action based on the priority of the rule that recommends it. The default value is 0.9.
Recommendation Order Weight (sn_nb_action.recommendation_order_weight)	Weight given to an action based on the priority of the rule that recommends it. The default value is 0.9.
Frequency Weight (sn_nb_action.frequency_weight)	Weight applied based on the number of times an action is recommended across rules. The default value is 1.5.

3. Select **Save**.

Configure force refresh for recommendations

Configure the *`Trigger Recommendation Refresh`* data broker to refresh and update the recommendations based on the results from UI events for precise recommendations. Similarly,

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use the `ForceRefreshRecommendations` method for configuring an explicit refresh mechanism.

Before you begin

Role required: sn_nb_action.next_best_action_author, or admin

About this task

Prior to the Zurich family release, the recommendations often remain outdated due to refresh triggers being tied only to updates on primary context records. Starting with the Zurich family release, you can configure explicit and event-driven refreshes for various context updates beyond just the primary context table to improve recommendations relevance.

- Explicit refresh mechanism: Enables you to trigger recommendation refreshes manually, independent of internal context changes, addressing scenarios where event-driven updates are insufficient.

  Call the `ForceRefreshRecommendations` method. The `ForceRefreshRecommendations` method is shipped with the base system as part of the *`NextBestActionServiceImpl`* script include.

  `ForceRefreshRecommendations` method:

  ```
  sn_nb_action.NextBestActionService().forceRefreshRecommendation
  s(input.ruleContextSysIds, input.currentRecordSysId,
   input.refreshAllUsers);
  ```

- Event-driven refresh: Implements automatic recommendations updates triggered by predefined system events such as attribute changes on related tables or user interactions like button clicks or tab navigation.

  Configure the *`Trigger Recommendation Refresh`* data broker of a UI component in the UI builder. This data broker is shipped with the base system and is available for all the UI components of the record pages. Perform the following steps to configure this data broker.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI builder**.
2. In the UI builder, open the **Workspace** experience which you want update.
3. Open the record page containing the UI component for which you want to configure the data broker.
4. In the content tree, select a UI component.
   A panel opens on the right with Configure, Style and Events tabs.
5. In the Events tab, select **Execute Data Resource - Trigger Recommendation Refresh 1**.
6. On the Configure modal, set the following properties.

Configure modal

Property	Description
Rule Context SysIds	Sysid of the rule context records that must be applied to the UI component. The recommendations of these rules are reflected in the recommendations tab when the event is triggered. This property is of String array type.

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Property	Description
Current Record SysId	Sysid of the record to which you want to associate the UI event. This property is of String type.
Refresh All Users	Refreshes recommendations for all the active agent, when set to true. By default, the value is set to false. This property is of Boolean type.

7. **Optional:** In the **When to trigger** drop-down, select one of the following.

Option	Description
Always	Triggers the refresh every time there's an up date.
Conditional	Triggers the refresh when the defined condi tion is met. (Optional) Define the condition in the **Event Handler condition** field.

8. Select **Apply** in the Configure modal.

Result

When the configured component is triggered, the recommendations are refreshed and updated accordingly in the CSM/FSM Configurable Workspace.

Configuring AI search in Recommended Actions

As an admin, configure AI search in Recommended Actions to enable agents to perform an AI search to find relevant resources.

You can configure AI search in Recommended Actions by performing these procedures.

Steps to configure AI search

Step	Action
Enable the AI search tab in UI builder	Deselect the **Hide Search** button in UI Builder to display the AI search tab in the contextual side panel of your workspace.
Create a context and select a search application configuration	• Create a context so that agents can see recommendations for records from a specific table, such as the Case table. • Select a search application configuration to specify AI search as the search engine. This configuration includes search sources and genius result configurations.
Map AI search results with guidance inputs in Recommended Actions	Map AI search results with guidance inputs to enable the AI search results to be displayed with appropriate actions.

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Steps to configure AI search (continued)

Step	Action
Automatically map AI search results with guidance inputs	Automatically create AI search results for a search configuration application in Recommended Actions.
Configure dynamic filters in AI Search for Recommended Actions	Configure AI Search to preprocess contextual inputs from Recommended Actions so that search results are dynamically filtered based on the current record context.

Configuring genius results

In the search profile of your selected search application configuration, link the following Genius Result configurations to display actionable top results. For more information, see Link a Genius Result configuration to a search profile.

Genius Result configuration	Description
Catalog item	Displays top search results from the Catalog Item [sc_cat_item] table. Each answer card shows a single CI record.
People	Displays top search results from the User [sys_user] table. Each answer card shows a single user record.
Q&A	Displays top search results extracted from HTML fields of records on the Knowledge [kb_knowledge] table and tables that extend it. Each answer card shows a topic snippet and an answer snippet extracted from a single knowledge article.
Now Assist Q&A	Displays the top search results extracted from the HTML fields of the records on the Knowledge [kb_knowledge] table and the tables that extend it. Each answer card shows an answer snippet extracted by Now LLM from a knowledge article. For reference, the answer card also includes a link the user can select to view the source knowledge article. **Note:** Now Assist in the AI Search application (com.ais_assist) is required to link the Now Assist Q&A Genius Result configuration to your search profile. For more information, see ServiceNow Otto for AI Search.

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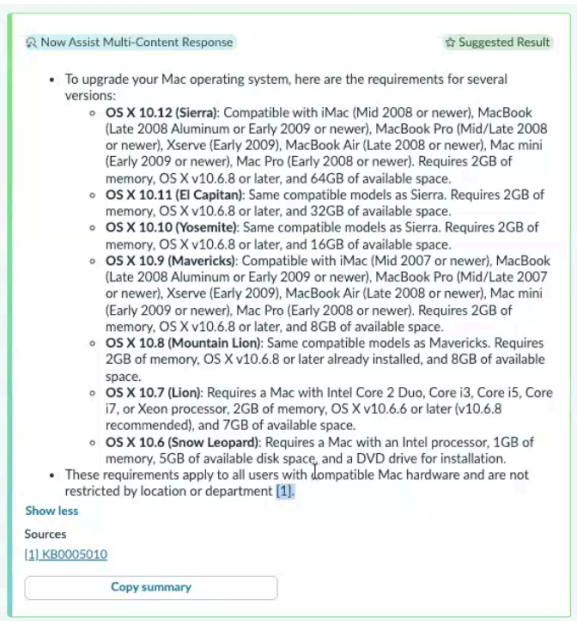
Genius Result configuration	Description
	Important: Starting with the Now Assist in AI Search 11 release, the Now Assist Q&A Genius Results feature is in maintenance mode. This feature will remain available but will not be updated or supported. Similar and improved functionality is available in the newer Now Assist Multi-Content Response Genius Results feature. For more details on this feature, see Summary Genius Results.
Now Assist Multi-Content Response	Displays a single top search result that summarizes content from multiple sources. The answer card shows one grouped summary with numbered citations that link to the source records, such as knowledge articles, and Service catalog items. You can select the **Copy summary** button to copy the summary and share it with customers. For more information on theNow Assist Multi-Content Response, see Summary Genius Results. 

Customizing Recommended Actions UIB component for AI search

Customize the Recommended Actions UIB component to align with your organization's requirements:

- Modify titles for the main heading, Recommended Actions tab, and Search tab.
- Modify the order of the **Recommended Actions** and **Search** tabs.
- Hide or show Recommended Actions and Search tabs.

For more information, see Recommended Actions UIB setup.

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Explore advanced customization options, such as adjusting the number of results to view on a page, identifying genius results to add to the search profile, and configuring search sources. For more information, see Configuring AI Search.

Enable AI search in Recommended Actions

As an admin, you can enable the Recommended Actions - AI search on the Front-line case page, CSM default record page, and CSM Interaction page (for chat, video, walk-up, and email channels) by setting the **hideAgentAssistShowRA** UX page property to true.

Before you begin

Role required: admin

About this task

The Recommended Actions - AI search is available for the following pages:

- CSM default record page
- Front-line case page
- CSM Interaction record page for chat, video, email, and walk-up channels

The following table shows how you can avail Recommended Actions - AI search feature:

Recommended Actions AI search - version compatibility

Version	Feature availability
New customers starting with Yokohama release	Recommended Actions - AI Search is an integral part of the Contextual Side Panel by default. No additional manual configuration is required.
Customers who on-boarded before Yokohama release	Agent Assist is enabled by default with the option to manually migrate to Recommended Actions - AI search. To migrate from Agent Assist to Recommended Actions - AI Search create and set the *`hideAgentAssistShowRA`* UX page property to `True`. **Note:** If you already created this property for enabling Recommended Actions in the chat interaction record, you need not create it again.

Procedure

1. Navigate to **All**.
2. Search for `sys_ux_page_property.LIST` and press Enter.

   Note: If the *`hideAgentAssistShowRA`* UX page property already exists, you need not create it again.

3. Select **New**.
4. Fill in the fields on the form.

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UX page property form

Field	Description
Page	Page for which the property is applicable. Select `CSM/FSM Configurable Workspace`.
Name	Name of the page property. Give the name as `hideAgentAssistShowRA`.
Type	True or False
Value	Enables or disables the property. Set the value to `true` to enable the property.
Application	Application scope in which the property is being created.
Description	Brief description of the UX page property that you're creating.

5. Select **Save**.

Map AI search results with guidance inputs in Recommended Actions

Create mappings between AI search results and guidance inputs to recommend relevant actions to agents using AI search or enable agents to use AI search to search for the relevant resources.

Before you begin

Role required: sn_nb_action.next_best_action_author, admin

Procedure

1. Navigate to **All** > **Recommended Actions** > **Contexts**.
2. Select a context for the AI search.
   If a message appears about the application scope, select **here** to be able to edit the record.
3. In the **Search Application Configuration** field, select the Lookup using list icon and select either the base system CSM Configurable Workspace Search Config or a custom configuration that specifies AI search as the search engine and contains your desired search settings.
   You can configure the search result display and refinement settings in the search application configuration. For more information, see Search application configurations.

   The **[CSM AIS] Configurable Workspace Search Config** search application configuration is provided with the CSM Configurable Workspace store application. To access this configuration, navigate to **AI Search** > **Search Experience** > **Search Applications**.
4. In the Search result mapping related list, select **New**.
5. In the **Action type** field, select Guidance as an action type.
6. In the **Action** field, select an action to associate with the guidance.
   The available actions are determined by the selection in the **Action type** field.

   a. In the **Action** field, select the Lookup using list icon ( ).
      In the resulting pop-up window, the **Table name** field is auto-populated with the table that stores the available actions for the selected action type.

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b. In the **Document** field, select the Lookup documents using list icon ( ) and then select the action.

c. Select **OK**.

d. Save the record.
Saving the record displays the required action inputs.

7. Configure the AI search result type.

Option	Steps
Map genius result: No	**a.** In the **Map genius result** field, select **No** to enable AI search result mapping to guidance inputs. **b.** In the **Search source table** field, select a source table to map the required fields to guidance inputs. This field shows all the source tables mapped to the search profile of your search application configuration.
Map genius result: Yes	**a.** In the **Map genius result** field, select **Yes** to enable ge nius result mapping to guidance inputs. **b.** In the **Genius result configuration** field, select a genius result configuration to map the return fields to guidance inputs. This field shows return fields of the genius result config uration that is linked to the search profile of your search application configuration. For more information, see AI

8. Save the record.
The AI search parameters display in the pill picker.

9. Map the action inputs.
Action types and actions need inputs. These parameters enable agents to complete an action. You can choose static values for action inputs or you can use the pill picker to supply dynamic values.

Option	Steps
Use a static value	Enter a value in the input field or use the lookup icon to se lect a value from the list.
Use a pill picker	**a.** Select the pill picker next to the field. The following are available in the pill picker: ▪ Context ▪ The outputs from the search source table or genius re sult configuration ▪ Search query term, search result preview, search result sysId, search result table, search result teaser, search result title, and search result url

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Option	Steps
	Search query term: When an agent searches in the AI Search tab of the Recommended Actions side panel and selects a matching search result, the system auto matically captures the search query term and passes it to the configured guidance as a dynamic input. This eliminates the need for agents to re-enter the same in formation when executing a workflow triggered from search results, reducing handling time and providing a smoother agent experience. **b.** Select the output from the pill picker.

10. Select **Update**.

Automatically map AI search results with guidance inputs in Recommended Actions

Automatically create AI search results for a search configuration application in Recommended Actions.

Search application configuration records specify the search engine and settings to use for search in Recommended Actions. When you choose AI search as an application's search engine, you can configure the search results and map them to specific actions.

Starting with the Yokohama release, the Recommended Actions application automatically creates the mapping between search results and actions.

When an admin creates or updates the search application configuration for a context record, the system automatically creates search result mapping records for each of the search sources in that configuration.

- If a search source does not have an existing mapping to an action, the system maps the search source to the Default guidance for search results guidance.
- If a search source has an existing mapping to a specific action, the system keeps that mapping and does not overwrite it with the default guidance.

Mapping records are stored in the Search result recommended action mapping table (sn_nb_action_search_result_ra_mapping) and are displayed in the Search result mapping related list on the context record.

When a context record is saved or updated and search result mappings are created, the system displays a message: "Based on the selected Search Application Configuration the Search Result Mapping list has been updated. Please review!"

Adding new search sources

Admins can add search sources to the search profile of a search application configuration. If a new search source is added to the configuration selected for a context record, the system does the following:

- Creates a new record in the Search result to recommended action mapping table (sn_nb_action_search_result_ra_mapping) for the added search source.
- Maps the search source to the Default guidance for search results.

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When a search source is deleted from the search profile, the system removes the corresponding record from the Search result to recommended action mapping table (sn_nb_action_search_result_ra_mapping).

Refreshing the Search result mapping related list

The system stores search result mapping records in the Search result to recommended action mapping table and displays them in the Search Result Mapping related list on the context record.

The Search Result Mapping related list includes a **Refresh** button that admins can use to create search result mapping records for the search sources within a selected search application configuration in a context record. Selecting **Refresh** generates mapping records for any missing search result mappings in the search application configuration and associates them with the Default guidance for search results guidance.

Note: Refreshing the Search Result Mapping list does not override existing customer-defined mappings.

Newly created mapping records are active by default. Admins can control which search sources are displayed to agents by enabling or disabling the **Active** field on the mapping records.

Search result recommended action mapping table

The Search result recommended action mapping table (sn_nb_action_search_result_ra_mapping) stores the mapping between search sources and actions. Records in this table include an **Active** field which the admin can use to manage the activation state of search result mappings. When a new record is created in this table, the **Active** field is set to true by default.

When an agent performs a search in the Recommended Actions search component in CRM Workspace, the system displays the search sources that are marked as active in the search result mapping configuration. Inactive search sources are excluded from the search results.

Changes in the search result mapping, such as activating or deactivating a search source, are automatically reflected in the search results.

When the **Active** field is disabled for a search source, an admin can create a new mapping for that source. A search source can have multiple search result mapping records, but only one can be active at a time.

Conditional UI display for search result mapping

The Recommended Actions context record includes the **Search application configuration** field. When an admin selects a configuration in this field, the search result mapping records for the configuration are displayed in the Search result mapping related list. If the **Search application configuration** field is empty, the Search result mapping related list does not appear on the context record.

Enable full view search for Recommended Actions in a configurable workspace

The full view search feature displays the AI search results in a new subtab with an expanded view. Use the following information to enable this feature in any configurable workspace.

Before you begin
Role required: admin

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About this task

AI search results appear in the Recommended Actions tab in the contextual side panel in the form of guidances that you can act on. Selecting the Full view search icon displays the AI search results in a new subtab with an expanded view.

When a user selects the Full view search icon, the Recommended Actions application dispatches an event called **RECOMMENDED_ACTIONS#ACTION_CLICKED** with a type of **raExpandedSearch**. This event needs to be handled in the corresponding team layer that wants to uptake the full view search page. The following code snippet provides an example about how to navigate to the page with the correct properties.

```
if (event.payload.actionProps.type == 'raExpandedSearch') {
          const { contextTable, contextId, contextSysId,
searchTerm,selectedFilterTab,selectedFacetOptions,
selectedSortOption,actionConfigurations } =
 event.payload.actionProps;
          helpers.navigate.to('ra-expanded-search',
 { 'contextTable':
contextTable, 'contextId': contextId }, {'contextSysId':
 contextSysId,
'searchTerm': searchTerm, 'selectedFilterTab':
 selectedFilterTab,
'selectedFacetOptions': selectedFacetOptions,
 'selectedSortOption':
selectedSortOption, 'actionConfigurations':
JSON.stringify(actionConfigurations)}, false, false, 'current');
      }
```

Use the following steps to define the full view search page in a configurable workspace.

Procedure

1. Navigate to UI Builder and select your workspace experience.
2. Create a page with the following URL path: **ra-expanded-search**.
   This is the path that you will use in the above script to open the full view search page. For more information, see Create a blank page in the UI Builder documentation.
3. Select the following required parameters for the page.
   - contextTable
   - contextId
4. **Optional:** Select the following optional parameters for the page.
   - contextSysId
   - searchTerm
   - selectedFilterTab
   - selectedFacetOptions
   - selectedSortOptions
   - actionConfigurations
5. Open the page variant that you created in step 2 by navigating to the **sys_ux_screen.list** and selecting the page variant from the UX Screens list.
6. Use a copied version of the page definition created by RA for full view search.
   For example, **Recommended Actions Expanded Search Default (sysId - b646da9443a8c2108d82c8641ab8f2f3**.

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Note: It's not advised to use the mentioned page definition directly.

7. Create a viewport inside the page variant to load the guidance detailed experience to make it work in the full view search page.
   a. Create an app route record by navigating to **sys_ux_app_route.list** and selecting **New**.
   b. Fill in the fields based on how you have configured the full view search page.
   c. Select **Submit**.

   Note: Be sure to use a different route/parent macroponent composition element ID to avoid any conflicts with the CSM Recommended Actions Full View Search page.

Configure dynamic filters in AI Search for Recommended Actions

Configure AI Search to preprocess contextual inputs from Recommended Actions so that search results are dynamically filtered based on the current record context.

Before you begin

Role required: admin

About this task

When search results are generated in Recommended Actions, you can make them contextually relevant to the current record by using the contextual information passed in the additional context payload of the AI Search API. Using this contextual information, you can implement preprocessing logic through the **AisDynamicFilter** extension point to filter search results based on conditions that match the current context record.

When preprocessing is implemented, AI Search considers the defined filter conditions before returning search results, ensuring that only results matching those conditions are displayed. For example, you can define a filter condition to exclude the current context record from search results, so that the record you're working on does not appear in the recommendations.

Procedure

1. Enable dynamic filtering for a specific search source in a search profile.
   a. Navigate to **All** > **AI Search** > **Search Experience** > **Search profiles**.
   b. Select a search source of your choice from the Search Sources related list.
2. In the selected search source, select the **Has Dynamic Filters** check box and select **Save**.

   Note: There may be multiple search profiles in your instance. Enable contextual filtering only for the search sources in a profile where you need this functionality. For more information on Search source form, see Search Source form.

3. Create the AisDynamicFilter implementation for search sources.
   a. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
   b. Open the **AisDynamicFilter** extension point.
   c. Create an implementation by selecting the **Create Implementation** link.

      In the implementation:

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- `isApplicable`: This method defines the conditions that determine if dynamic filters should be applicable for a given search source or not. Use the `additionalContext` stringified JSON with the following format in the implementation. It defines the contextual information passed to the AI Search API which is used in AI Search Dynamic filters to contextually filter out the search results.
- `getFilterCondition`: Use this method to define the filter criteria that AI Search applies to search results during preprocessing.

Note: Do not implement the `shouldRemoveDocument` method.

Example: The following is an example implementation of how to exclude current context record from the search results:

```
isApplicable: function(searchContextConfigId, profileId,
 tableName, additionalContext, preprocess) {
        if (additionalContext != null &&
 JSON.parse(additionalContext).source ==
 'recommended-actions' && tableName ==
 JSON.parse(additionalContext).contextRecordTable &&
 preprocess) {
            return true;
        }
        return false;
    },
    getFilterCondition: function(searchContextConfigId,
 profileId, tableName, additionalContext) {
        if (additionalContext != null &&
 JSON.parse(additionalContext).source ==
 'recommended-actions' && tableName ==
 JSON.parse(additionalContext).contextRecordTable) {
            var pasedAdditionalContext =
 JSON.parse(additionalContext);
            var gr = new GlideRecord(tableName);
            gr.addEncodedQuery('sys_id!=' +
 pasedAdditionalContext.contextRecordId);
            gr.query();
            return gr;
        }

    },

    shouldRemoveDocument: function(searchContextConfigId,
 profileId, recordClass, sysId, additionalContext) {

    },
```

The parameters in the preceding additionalContext are defined as:

- `contextRecordId`: Sys ID of the current context record where recommendations are surfaced.
- `contextRecordTable`: Table name of the current context record where recommendations are surfaced.
- `contextualInputs`: Inputs to the context record.
- `source`: Origin of the search request which is predefined as Recommended Actions. This allows you to scope your filter conditions specifically to Recommended Actions, so the filtering logic does not apply to other search contexts.

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Result
In the Search tab of the Recommended Actions context side panel, only the search results that match the exact context of the current record appear.

Recommended Actions for Service

Use Recommended Actions for Service to display relevant actions to agents based on the context of a record.

> **Important:** Starting with v31.0, the Recommended Actions for Customer Service (sn_cs_nb_action) plugin has been renamed to Recommended Actions for Service (sn_cs_nb_action).

The Recommended Actions for Service application displays recommendations for case records in CRM Workspace. Agents can take the actions provided by the recommendations to help customers and resolve their issues. Agents can also use this application to perform an AI search to find relevant resources.

The Recommended Actions for Service application provides predefined guidances and recommendation context records tailored for Customer Service Management. It also provides workspace configurations that automatically display recommended actions and search results in the contextual side panel.

For more information about recommended actions and AI search results, see Recommended Actions.

Context records

The Recommended Actions for Service application provides context records for the Case and Interaction tables. A context enables agents to see recommendations for records from a specific table when certain rules are met.

- Case Context record
- Interaction Context record

Guidances

The Recommended Actions for Service application includes custom guidances for the following tables:

- Knowledge
- Case
- Incident
- Problem
- Change Request

These guidances enable search results from the corresponding search source tables for the Case Context record. Customer service agents can see these results in the Recommended Actions tab in the contextual side panel.

Plugin

The Recommended Actions for Service application (sn_cs_nb_action) is available from the ServiceNow Store.

This application has a dependency on the Recommended Actions application.

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Request apps 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.

Contexts in Recommended Actions for Service

A context enables agents to see recommendations for records from a table when certain rules are met. These recommendations can help agents by suggesting actions to take based on the record context.

The Recommended Actions for Service application provides context records for the Case and Interaction tables.

Case Context record

The Recommended Actions for Service application provides the Case Context record for the Case table.

Context records include rules and recommendations. The Case Context record also includes search result mapping records for the search source tables. The following tables are mapped to specific guidance actions:

- Knowledge
- Case
- Incident
- Problem
- Change Request

The remaining tables are mapped to the Default guidance for search results guidance action.

Interaction Context record

The Recommended Actions for Service application includes a context record and search mapping record that automatically displays search results from the Knowledge table for chat interaction records.

The Interaction Context record enables search based on the short description of the interaction record and displays relevant articles. The search mapping record maps knowledge results to the **Share KB in chat interactions** guidance. During chat interactions, the system accurately displays knowledge results in the Search tab in the contextual side panel.

The Recommended Actions for Service application also includes a search mapping record that maps all search source tables, with the exception of the Knowledge table, to the Default guidance for search results guidance action. During chat interactions, the system accurately displays results for the search source tables in the Search tab.

Follow these steps to enable recommendations in the contextual side panel for chat interactions:

1. Navigate to **All** > **Recommended Actions** > **Contexts** > **CSM Interaction context**.
2. Enable the **Active** check box.
3. Select **Update**.

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Fix script

The Recommended Actions for Service application includes a fix script that checks for existing context records associated with the same table as the Interaction Context record.

- If one or more records for the same table are found, the Interaction Context record is deactivated.
- If no existing context records for the same table are found, the Interaction Context record remains active.

This avoids duplicate or conflicting context records.

Activating or deactivating context records

When activating or deactivating context records, the system displays alert messages so that contexts can be managed effectively without causing conflicts.

If multiple contexts are activated for the same table, the system alerts the admin to specify the correct **contextSysID** property in the Recommended Actions component on record pages for the referenced table.

If an admin activates multiple contexts for the same table, the system displays a message advising the admin to specify the correct **contextSysID** property on the Recommended Actions component for all record pages that reference this table.

The message includes information about how to configure the **contextSysID** property on the Recommended Actions component and what happens if the correct context is not specified.

The system logs all context activation and deactivation events along with the displayed alerts.

Guidances in Recommended Actions for Service

A guidance is an action that an agent can take or information that an agent can share as they work to resolve tasks, such as customer service cases. Guidances appear as cards in the contextual side panel in a workspace.

The Recommended Actions for Service application includes custom guidances for the following tables:

- Knowledge
- Case
- Incident
- Problem
- Change Request

These guidances enable search results from the corresponding search source tables for the Case Context record. Customer service agents can see these results in the Recommended Actions tab in the contextual side panel.

Knowledge guidance

The Case Context record includes a search result mapping record for the Knowledge table that maps search results to the Attach and share article guidance. When an agent is viewing a case record, preview cards for Knowledge search results in the Recommended Actions tab include the **Attach and share article** action.

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Case guidance

The Case Context record includes a search result mapping record for the Case table. This record maps search results from the Case table to the **Case resolution guidance**.

The Case resolution guidance is configured with dynamic actions that are determined by the state of the case returned by the search. These actions include:

- **Link as parent case**: This action links the recommended case as a parent to the current case. (The current case is a non-major case and the recommended case is major/non-major).
- **Link as child case**: This action links the recommended case as a child to the current case. (The current case is a major case and the recommended case is a non-major case.)
- **Copy resolution**: This action copies the resolution code and resolution notes from the recommended case to the current case. This action is available when the recommended case is in the Closed or Resolved state.

Note: If the current case and the recommended case are both major cases, no action is included on the preview card.

The preview card for the case resolution guidance includes the case title and number, the current state and priority, the case description, and the dynamic action.

Interaction guidance

The Case Context record includes a search result mapping record for the Incident table. This record maps search results from the Incident table to the **Link incident to current case** guidance.

Agents can link the recommended incident by selecting the **Link incident** action on the preview card in the Recommended Actions tab. This action does the following:

- Updates the **Incident** field on the case record with the incident number.
- Adds an entry to the work notes.
- Displays a message when the incident is successfully linked. A message is also displayed if the linking fails.

The preview card for the **Link incident to current case** guidance includes the incident title and number, the current state and priority, and a brief description of the incident.

Problem guidance

The Case Context record includes a search result mapping record for the Problem table. This record maps search results from the Problem table to the **Link problem to current case** guidance.

Agents can link the recommended problem by selecting the **Link problem** action on the preview card in the Recommended Actions tab. This action does the following:

- Updates the **Problem** field on the case record with the problem number.
- Adds an entry to the work notes.
- Displays a message when the problem is successfully linked. A message is also displayed if the linking fails.

The preview card for the **Link problem to current case** guidance includes the problem title and number, the current state, the number of related incidents, and a brief description of the problem.

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Change request guidance

The Case Context record includes a search result mapping record for the Change Request table. This record maps search results from the Change Request table to the **Link change request to current case** action.

Agents can link the recommended change request by selecting the **Link change request** action on the preview card in the Recommended Actions tab. This action does the following:

- Updates the **Change Request** field on the case record with the change request number.
- Adds an entry to the work notes.
- Displays a message when the change request is successfully linked. A message is also displayed if the linking fails.

The preview card for the **Link change request to current case** guidance includes the change request title and number, the current state, the risk level and type of change, and a brief description of the change request.

Recommended Actions in the chat interaction record

The Recommended Actions feature is available by default in the contextual side panel for chat interaction records.

This feature appears as the first tab in the contextual side panel and is available for interactions of type chat.

The Recommended Actions feature is enabled by default for new (zboot) customers. This feature replaces Agent Assist, which is disabled from the contextual side panel.

The Recommended Actions feature includes two tabs:

- Recommendations: displays relevant actions based on the context of the chat interaction record.
- Search: displays relevant search results based on the short description of the chat interaction record.

hideAgentAssistShowRA UX page property

Enabling Recommended Actions for chat interaction records is controlled by the **hideAgentAssistShowRA** UX page property, which is only available for new customers.

Existing customers that want to disable Agent Assist in the contextual side panel and enable Recommended Actions can create this UX page property.

1. Navigate to **All** > **Now Experience Framework** > **Experiences**.
2. Select CSM/FSM Configurable Workspace.
3. Select **New** in the UX Page Properties related list.
4. Create the property with the following values:
   a. Name: hideAgentAssistShowRA
   b. Type: true | false
5. Set the property to true.
6. Select **Save**.

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Recommended Actions component contextSysId property

The Recommended Actions (RA) component includes the contextSysId property, which determines the rules and data sources that are evaluated to provide recommendations and search results. This property is automatically set to the default context for case records and displays accurate recommendations and search results on the Front-line case page.

This change to the contextSysId property only applies to new customer instances where the Recommended Actions component is added to the Front-line case page. Existing customers are not impacted.

Machine learning solutions for Customer Service Management

Machine learning in Customer Service Management helps with case creation, assignment, and resolution.

Task Intelligence for Customer Service	Use the following AI capabilities to automate several routine tasks across the case life cycle and enable agents to focus on complex case resolution. • Record categorization • Sentiment analysis • Language detection • Document intelligence
Predictive Intelligence for CSM solution definitions	Use predictive intelligence solution definitions to assist agents with a variety of tasks. Solution definitions predict one or more output fields based on a configured input field.
Trending case topics	Identify clusters of cases with similar issues and pinpoint factors that drive up case volume. Each cluster of cases represents a trending case topic.
Similar case recommendations	Enable customer service agents to easily find similar cases that can provide helpful information about cases they are currently working on.
Estimated time to resolve a case	Predict the estimated time to resolve a case based on attributes such as the case short description, category, priority, and assignment group.
Predictive Intelligence for case management	Predict values for a case, such as the category, priority, and assignment group, based on information entered in the short description.
Auto-responder notifications	Use auto-responder notifications to share relevant content in email notifications that can help deflect cases.

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Task Intelligence for Customer Service

Task Intelligence for Customer Service offers several AI capabilities such as language detection, record categorization, Sentiment Analysis, and Document Intelligence. These capabilities automate several routine tasks across the case lifecycle and enable agents to focus on complex case resolution.

Task Intelligence for Customer Service features

Feature	Description
Record categorization	Task Intelligence for Customer Service provides the following types of categorization: • **Multi-lingual record categorization**: Use a machine learning model that understands English, French, German, and Spanish to evaluate text in emails and records created in different languages and to predict and automatically populate fields on records in the Case table, tables that extend the Case table, and the Interaction table. This feature uses one machine learning model to support multiple languages so you no longer need one model per language. The model can also support additional languages on demand. • **Attachment-based record categorization**: Use a machine learning model to parse email or record text and attachments and automatically populate fields on case and interaction records based on signals contained in the text. This feature evaluates text in the email subject and body, the record short description and description, and the attachments and uses all of this information to predict field values. As a result, you can integrate predictions with any routing engine and automatically route records to the appropriate service desk based on these values.
Sentiment Analysis	Detect and display the initial and ongoing sentiment of customer service cases by evaluating the following text: • Email subject and body • Case short description and description Help agents gauge customer emotions and better prioritize their work while enabling them to provide more empathetic and compassionate customer experiences. Sentiment Analysis is currently available in English.
Language detection	Identify the language used to create a customer service case and add the language to the **Language** field for the case record. This feature can identify up to 20 different languages. Add the identified language to the case as a skill, which is stored in the Task Skills table. This table can be configured as a related list on the Case form.

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Task Intelligence for Customer Service features (continued)

Feature	Description
	Use the identified language to route cases to assignment groups and agents with the necessary language skills.
Document Intelligence	Document intelligence reduces the time needed to resolve the case by automating some of the routine case tasks, which enables agents to focus on more complex case resolution. Extract relevant information from PDF and image files, such as credit card numbers, vendor names, or customer addresses, and add that information to fields on the case.
Task Intelligence Admin Console	The Admin Console provides a business friendly interface that you can use to create, train, and deploy machine learning models to predict field values for records, extract sentiment, and detect language. The models provide flexible options to either auto-fill values on the records or to provide recommendations only, depending on the sensitivity of those fields. An option is also available to run the model in the background only for monitoring purposes.
DocIntel Admin experience	The Document Intelligence application includes the DocIntel Admin experience, which provides an easy-to-use interface that you can use to do the following: • Create and configure document processing use cases • Monitor the performance of Document Intelligence use cases For more information, see Create a Document Intelligence use case.
Similar case recommendation	Use the Similar Case Recommendation feature to quickly locate similar cases that offer valuable insights into the current issue. Also, use this feature to suggest cases that might be related to major problems, helping you provide more informed and efficient support.

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.

Task Intelligence for Customer Service application

The Task Intelligence for Customer Service application (com.snc.csm_ml_task) is available from the ServiceNow Store. This application has the following plugin dependencies:

- Predictive Intelligence for Customer Service Management (com.snc.csm_ml)
- Case Management Core (com.sn_customerservice)

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- Skills Management (com.snc.skills_management)
- Dynamic Translation (com.glide.dynamic_translation)
- ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke)
- Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task)
- Admin Center for Task Intelligence (com.sn_ti_admin)

Configuring Task Intelligence for Customer Service

After installing the Task Intelligence for Customer Service application, you can configure the different features and use the Task Intelligence Admin Console to create models. For more information, see:

- Install and configure Task Intelligence features
- Set up and deploy Task Intelligence models

Using Task Intelligence for Customer Service

Use the Task Intelligence features to complete the following tasks:

- Create field prediction and sentiment models for case and interaction records
- Review and submit values extracted by Document Intelligence
- Review Task Intelligence analytics and prediction history

For more information about these tasks, see Use Task Intelligence for Customer Service.

AI Prediction Banner Display Behavior

AI prediction banner display in CRM Workspace: AI prediction banners in CRM Workspace are controlled by specific client-side and back end configurations that determine when and how prediction results are displayed to agents.

Client-side control: The AI Banner Display Client controls the functionality of prediction banners in CRM Workspace. This is the current implementation that replaces the deprecated version.

Default display behavior: The displayBanner property is set to false by default in the back end logic. This means that AI prediction banners are not automatically displayed unless explicitly configured to do so.

Default page requirement: AI prediction banners only work on the default page of the workspace. If you have customized workspace pages or are using non-default page layouts, the prediction banners will not display.

Standard UI Form versus workspace display: There is a clear distinction between how prediction results are displayed in the Standard UI form (back end) and how they are displayed in CRM Workspace. Predictions may be available and processing correctly in the Standard UI form, but the CRM Workspace display requires proper client-side configuration through the AI Banner Display Client to surface these predictions to agents.

Tip: When troubleshooting AI prediction banner visibility issues, verify both the back end prediction processing and the workspace client-side display configuration. Ensure you are using the default workspace page layout for banner functionality.

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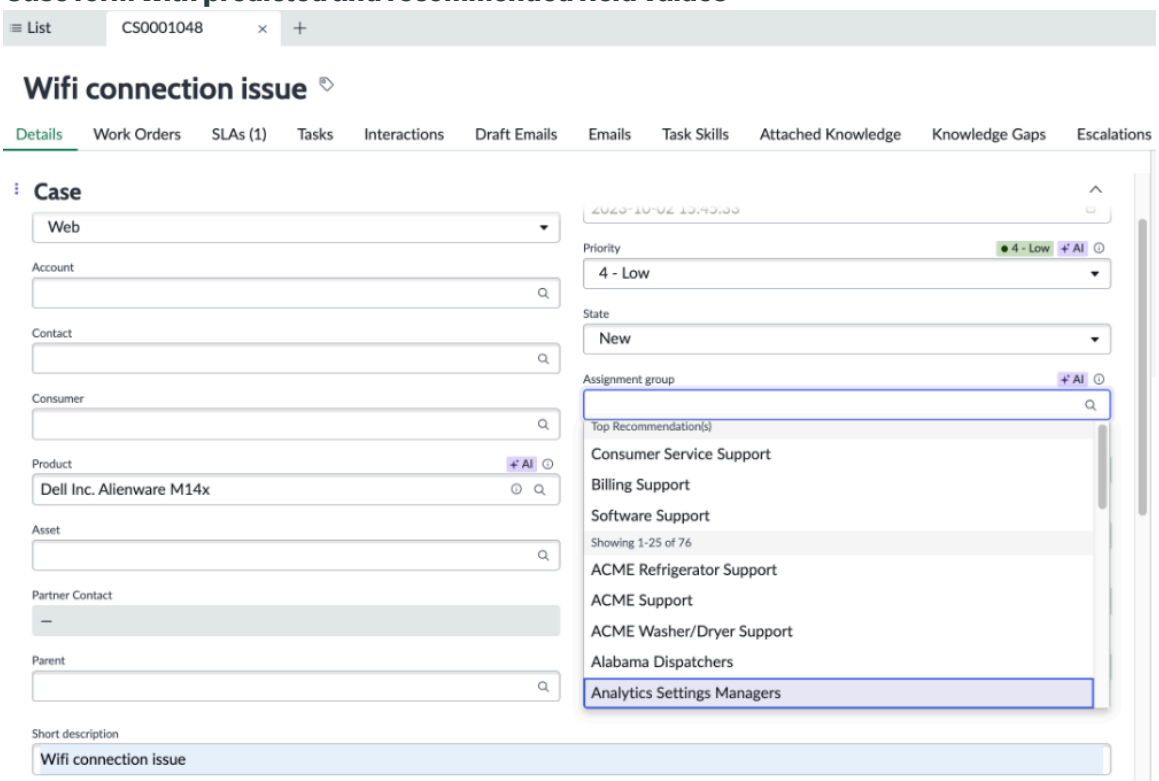
Record categorization

The record categorization feature included with Task Intelligence for Customer Service uses machine learning models to evaluate text, predict field values, and automatically populate fields on case and interaction records.

Record categorization supports multiple languages and can scan attachments in addition to evaluating text from emails and records. Use this feature to categorize cases, case types, and interactions from multiple channels including email, web, and chat.

You can use the results of the categorization to automatically route records to the right service desk, which avoid the need for multiple email inboxes and RPA bots. Auto- routing also frees up your employees to work on other tasks.

Case form with predicted and recommended field values



Predicted field values

On case and interaction records, the fields that contain predicted values are identified with an AI icon and label (AI). These fields also include an information icon that displays a message with additional context about the predicted values.

Note: in CRM Workspace, the AI icon is persistent over the life-cycle of the record. In Core UI, the AI icon is removed when the agent changes the field value.

In CRM Workspace and Core UI, the fields on the record that contain predicted values are identified with the *Predicted* or **Recommended** messages.

Recommended field values

Fields that are predicted by AI include recommended values. When an agent selects a predicted field, the system displays a drop-down list that includes the top three recommendations at the top of the list followed by all other values. This feature is available for the following types of fields:

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- Choice lists
- Single lookup
- Multi lookup
- Single and multi text fields

If the top three recommendations aren't available, the system displays a message in the Top Recommendations section of the dropdown list that no predictions are available. The other values follow this message.

The agent can select any value from the dropdown list, either one of the top three recommended values or one of the other values. The agent can also type in the field and filter the results in the dropdown list, except the top three recommendations which are always displayed.

Note: The top three recommendations remain in the dropdown list through the case life cycle regardless of the selected field value.

Filtering inactive field values from predictions

Enable the *sn_csm_ml_task.case.categorization.enable_inactive_filter* to remove inactive field values from predictions. The default setting for this property is false.

AI prediction banner

When a case record includes a categorization prediction, the system displays a banner at the top of the record. The banner is displayed when there is atleast one field with auto-fill predictions in categorization models. The banner is displayed for records in the Case table and extensions of the Case table.

Note: The banner is displayed in CRM Workspace and in the Core UI.

The system displays the banner when there is at least one field with an auto-fill prediction in categorization models or when one of the extracted fields hasn't been reviewed by the agent. The banner is displayed for records in the Case table.

Note: If the agent changes the predicted value, the banner is removed. If all predicted fields are recommended, the banner isn't displayed.

The banner can be enabled or disabled by the *sn_csm_ml_task.ui.banner.enabled* system property.

Prediction feedback

The system stores feedback on prediction results in the Predictor Result [ml_predictor_results] table. ml_admin role can access the table and view the results.

- Autofill: A value is considered to be predicted correctly (set to true) if the predicted value and the final value are the same.
- Recommendation: A value is considered to be predicted correctly if any one of the predicted values matches the final value.

The Predictor Result table also stores information about skipped and failed predictions. For more information about this table, see Components installed with Task Intelligence for Customer Service.

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Multi-lingual record categorization

Use a machine learning model that understands the following languages to evaluate text in emails and records created in different languages and to predict and automatically populate fields on cases, case types, and interactions.

- English
- French
- German
- Spanish

Multi-lingual record categorization uses one machine learning model that is trained to understand multiple languages. This model can:

- Understand the text in emails and records.
- Evaluate the text and predict field values.
- Add the predicted values to fields on cases, case types, and interactions.

Multi-lingual record categorization can support the following additional languages on demand:

- Arabic
- Chinese (PRC)
- Chinese (Taiwan)
- Dutch
- Italian
- Japanese
- Korean
- Polish
- Portuguese
- Russian
- Thai
- Turkish

Note: If you must evaluate emails or cases in these additional languages, reach out to the product team for support.

Attachment-based record categorization

Attachments can include valuable signals that help support desks to categorize and route records automatically. To take advantage of attachment information, you can use a machine learning model to parse email and record text and attachments and automatically populate fields on cases, case types, and interactions based on signals contained in the text.

The model can predict information about a case based on:

- Text in the subject line and body of a customer email.
- Text in the short description and description of a case or interaction.
- Text in email and record attachments.

Note: The model can be configured to use different fields for prediction.

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Attachment-based categorization uses all of this information to predict field values. As a result, you can automatically route records to the appropriate service desk based on these values.

Related topics

Configure record categorization

Task Intelligence Admin Console

Create a model to predict record fields

Sentiment Analysis

Sentiment Analysis can help you gauge customer emotions, enabling you to provide more empathetic and compassionate customer experiences.

Use the sentiment analysis feature included with Task Intelligence for Customer Service to:

- Evaluate email and case text.
- Identify the current sentiment of new cases.
- Identify the ongoing sentiment of updated cases.
- Display this information to agents and managers.

Agents can use current case sentiment to prioritize their work and ongoing sentiment as it trends over time to see if cases are moving in the right direction.

Managers can use sentiment to route cases to agents with the right empathy skills, monitor cases and reassign as needed, and avoid escalations. Manager can also identify coaching opportunities by looking at cases that ended on a negative sentiment.

Note: In the Brazil release, the sentiment analysis feature can predict sentiment for cases created in English.

Sentiment analysis machine learning models

Sentiment analysis uses a pre-trained machine learning model to evaluate email and case text and predict sentiment. This analysis takes place when a case is created and when it is updated by the customer.

Sentiment analysis for cases

Cases scenario	Description

When a case is created	The sentiment analysis model evaluates the following text to make a prediction:
	• Text in the subject line and body of emails.
	• Text in the short description and description of cases.
	
	If the model can make a prediction, it returns the following information:
	• A sentiment label and corresponding sentiment level.
	  ○ Positive (1.0)
	  ○ Neutral (0.5)
	  ○ Negative (0.0)
	• A confidence level for the prediction.

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Sentiment analysis for cases (continued)

Cases scenario	Description
	If the model can make a prediction, the sentiment is added to the **Original sentiment** field. If the model can't make a prediction, the **Original sentiment** is not set. This system stores the sentiment prediction information in the Predictor Results for Task table.

When a case is updated	The sentiment analysis model evaluates the following text to make a prediction:
	• The text from the body of a reply email.
	• Comments that a customer adds to the case.
	
	If the model can make a prediction, it returns the following information:
	• An updated sentiment label and corresponding sentiment level.
	• A confidence level for the prediction.
	
	The system:
	• Updates the **Current sentiment** field with the current sentiment.
	• Compares the updated current sentiment to the original current sentiment, calculates the change in sentiment, and updates the **Sentiment over time** field.
	  ○ If there is an increase in the score, the **Sentiment over time** field shows Improving.
	  ○ If there is a decrease in the score, the **Sentiment over time** field shows Declining.
	  ○ If there is no change in the score, the **Sentiment over time** field continues to display the previous value.
	
	Note: If the **Original sentiment** is Neutral and the **Current sentiment** is Neutral, then the **Sentiment over time** is Neutral.
	
	If the model can't make a prediction, no information gets recorded and the value in the **Current sentiment** field remains the same.

For more information about the pre-trained machine learning model, see Create a model to predict case sentiment.

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Prediction feedback

The system stores feedback on prediction results in the Predictor Result [ml_predictor_results] table. Users with the ml_admin role can access the table and view the results. For sentiment analysis:

- The default value in the **Predicted correctly** field for each sentiment prediction is set to true.
- The **Final input value** and **Final output value** fields remain empty because sentiment analysis predictions do not collect feedback from agents.

The Predictor Result table also stores information about skipped and failed predictions. For more information about this table, see Components installed with Task Intelligence for Customer Service.

Related topics

Configure Sentiment Analysis

Configure Sentiment Analysis

Create a model to predict case sentiment

Language detection

The language detection feature uses a pre-trained model to detect the language used to create customer service cases. You can configure the model to add the language to the **Language** field on the case record and/or add the language as a skill for the case.

All 30

Last refreshed 3m ago.

Number	Short description	Name	Contact	Account
CS0001045	Wifi Connection is poor	English	Alex Linde	Advanced Routing Components
CS0001054	Dit is zo'n zonnige dag en ik hou ervan	Dutch	(empty)	Avid Corporation
CS0001053	Tohle je tak slunečný den a miluju ho	Czech	(empty)	Advanced Super Routing
CS0001052	problema de conexion wifi -es	Spanish	(empty)	(empty)
CS0001051	problema de conexion wifi -es.	Spanish	(empty)	(empty)
CS0001031	Das ist eine gute Arbeit zu wissen. Ich bin immer für Sie da	German	(empty)	Spark Technologies
CS0001032	C'est un bon travail à savoir. Je suis toujours là pour toi	French	(empty)	(empty)
CS0001029	□□□□□□□□□□□□□□□	Japanese	(empty)	Advanced Super Routing
CS0001030	To je dobrá práce vědět. Jsem tu vždy pro tebe	Czech	(empty)	Advanced Super Routing

Agents can save time by not having to manually select the language for each case or rely on a manual process for case routing. You can use the language skill stored in the Task Skills table to route cases to the assignment groups and agents with the necessary language skills.

- Cases can be routed automatically with Advanced Work Assignment (AWA).
- Cases can be assigned to agents based on language skills using the assignment workbench.
- Cases can be assigned based on the value in the **Language** field.

Note: Routing based on detected language must be configured separately.

The language detection feature supports 20 different languages. For details, see Languages supported by Task Intelligence.

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Language detection flow

Detecting the language used to create a case is based on a flow, **Task Intelligence Case Language Detected**, which is available with the Task Intelligence for Customer Service application. This flow is triggered at case creation with the condition that at least one of these case fields is not empty:

- Short description
- Description

When a case is created, the system calls the Detect Language action in the Dynamic Translation spoke which evaluates the text and returns the detected language.

If the returned language confidence is above the defined confidence threshold, the system performs a check to see if the language exists in the Languages [sys_language] table. It performs this check by matching the language code to the value in the ID field.

If the language exists in the Languages table, the system does the following, depending on the language detection model configuration:

- Adds the language to the **Language** field in the Case table.
- Stores the prediction results in the Predictor Results for Task table [ml_predictor_results_task].
- Stores the language skill in the Task Skills table [task_m2m_skill].

For more information, see Create a model to detect case language.

Prediction results

The system stores feedback on prediction results in the Predictor Result [ml_predictor_results] table. Users with the ml_admin role can access the table and view the results.

For language detection, the Predictor Result table stores the prediction results from the Language Detection Service spoke. The **Detected Language** field stores the language returned by the Language Detection Services spoke.

The Predictor Result table also stores information about skipped and failed predictions. For more information about this table, see Components installed with Task Intelligence for Customer Service.

Related topics

Configure language detection

Task Intelligence Admin Console

Create a model to detect case language

Document Intelligence for Customer Service

Use the Document Intelligence for Customer Service feature to extract relevant information from email and case attachments, such as credit card numbers or customer addresses. Add that information to cases.

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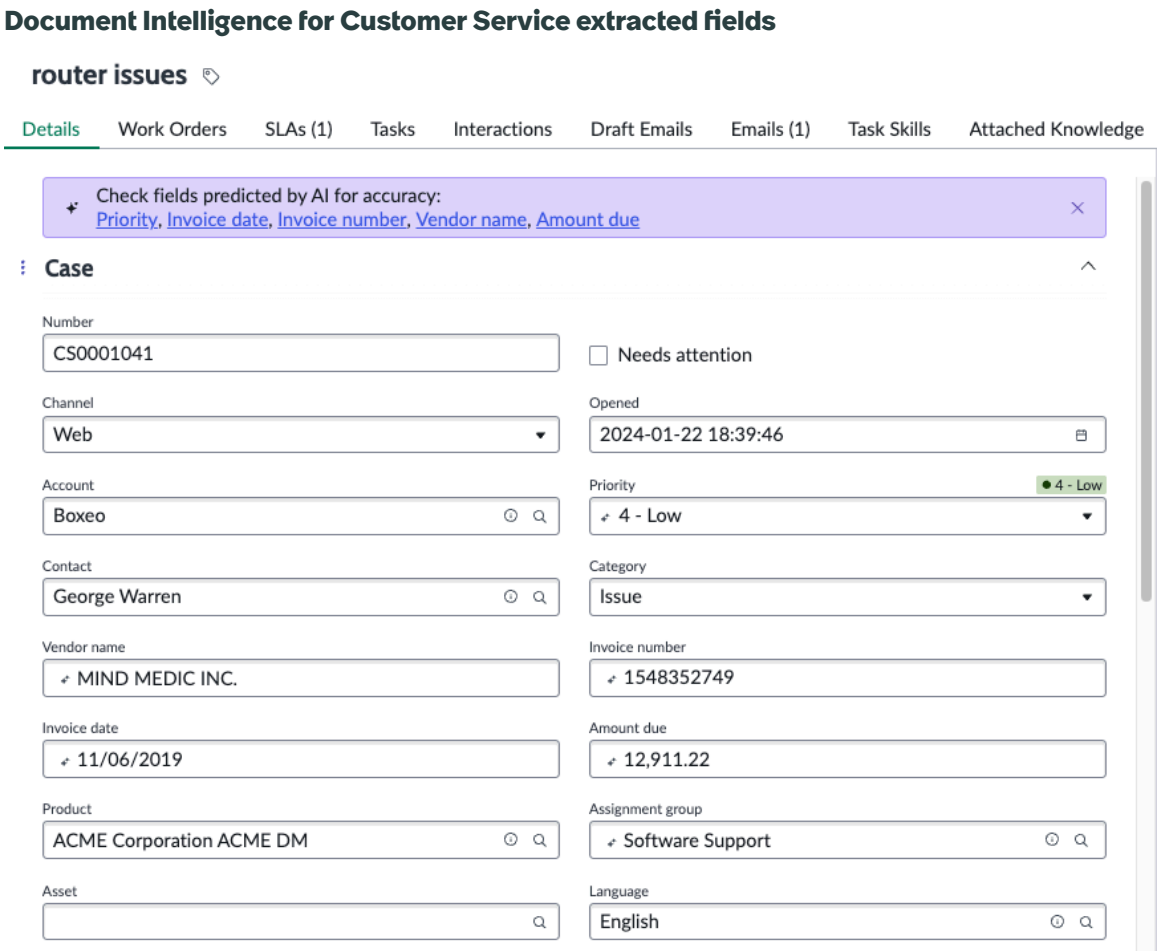

Agents can review values for extracted fields and make corrections as needed by accessing the Document Intelligence interface directly from the case. From this interface, agents can confirm correct values, fix incorrect values, and continue to train the model. This HITL/Human In the Loop interaction of verifying the recommended values enables agents to refine the model and continually improve performance.

Predicted field values

In CRM Workspace and Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with an AI icon (✨) and label. These fields also include an information icon that displays a message with additional context about the predicted values.

Note: The system displays the AI icon automatically. The agent doesn't need to refresh the record page.

In CRM Workspace and Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with the message `Predicted from DocIntel`.

Prediction banner

The system displays a banner at the top of a case record that contains one or more Document Intelligence field predictions. The banner is displayed:

- When there is at least one field with an auto-filled prediction from a categorization model.
- When one or more of the extracted fields haven't been reviewed by the agent.

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- When the fields are being updated.
- When the fields can't be generated or predicted.

Once an agent reviews the field, the banner is removed.

The banner is displayed for records in the Case table, extensions of the Case table, and interaction records. The banner is displayed in the Core UI and CRM Workspace.

The banner can be enabled or disabled by the `sn_csm_ml_task.ui.banner.enabled` system property.

DocIntel Admin experience

The DocIntel Admin experience provides an easy-to-use interface that you can use to do the following:

- Create and configure document processing use cases
- Monitor the performance of Document Intelligence solutions

The DocIntel Admin experience is available with the Document Intelligence Admin (com.snc.docintel_admin) store app. This app automatically activates the flows and properties required by Document Intelligence for Customer Service.

Access the DocIntel Admin experience through the Task Intelligence Admin Console:

1. Navigate to **Task Intelligence for Customer Service** > **Setup**.
2. In the Explore related applications section of the console, select **Open DocIntel** in the Document Intelligence card.

   Note: If Document Intelligence Admin isn't installed, the home page displays a link that you can use to download and activate the application.

For more information, see Create a Document Intelligence use case.

Use Cases list

From the DocIntel Admin experience, select **Use Cases** in the header to display a list of the use cases. The Use Cases list uses a default filter with an OR condition to show use cases for:

- Application = Task Intelligence for Customer service -or-
- MLUC ID = MLUC CSM-00003

Note: The user can't modify these filter conditions from the advanced view.

Each use case has an MLUC ID number that is automatically assigned when the use case is created. This ID number is used for machine learning usage tracking. The Task Intelligence for Customer Service application manages the MLUC ID for Document Intelligence for Customer Service use cases.

Document classification

With the system administrator role, you can create document classification use cases and define the classes or categories for the AI to detect and apply to documents. This process is useful in situations where there are multiple types of documents that must be evaluated.

Set up a document classification use case in the following steps.

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1. Create a document classification use case.

   Define the name and properties for the use case.

2. Create a document class.

   Define the classes or categories that the AI learns to detect and apply to documents.

3. Create a document task for document classification and upload sample documents for each class.
4. Train a use case.

   Initiate a training job to provide user inputs from completed document tasks to the AI for continuous improvement.

Related topics

Configure Document Intelligence for Customer Service

Review and submit values predicted by Document Intelligence

How Document Intelligence for Customer Service works

Document Intelligence for Customer Service extracts relevant information from email and case attachments and adds it to fields on the case record.

Use cases

A use case, previously known as a task definition, is a template that is used to define the structure of a type of document you want to process. A use case is made up of the use case record and its related fields, field groups, integrations, flows, and all the related machine learning (ML) models.

Document Intelligence use case components

Component	Description
Fields	Identifies a field that you want to extract a value for. A use case includes the list of fields to extract from case and email attachments and a mapping of the extracted values to fields in the Case table.
Field groups	Field groups help Document Intelligence extract data from documents with tables, check box lists, and other logical groupings of fields.
Document tasks	A document task includes one or more attached documents that are used to train the use case to identify and extract the correct information. Document tasks are stored in the Document Tasks related list on the Use Case form. The Document Intelligence feature creates these tasks for each case with valid attachments. Each task trains the model. In CSM Configurable Workspace, agents can view these tasks, confirm or correct extracted values, and continue to train the model.

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Document Intelligence use case components (continued)

Component	Description
Integrations	Select conditions that tell the Document Intelligence feature when to extract values. The system creates tasks for those cases that meet the specified conditions. For example, you can add a condition on the **Category** field where **[Category] [is] [Credit Card]**. At run time, the system evaluates the active use cases and identifies the use case to use for the case based on the integration. The first active use case that matches the integration for the case or case type is selected. If there are use cases for the case or case type but none that match the integrations, then no use case is selected. You can create one integration for a use case. If a use case has more than one integration, the system uses the latest one. **Note:** When creating an integration, make sure that the **Create Flow** check box remains unchecked.

Users with the ti_admin role or the ti_analyst role can create use cases for cases and for case types. At run time, the system identifies the correct use case based on the case or case type when a case is created and has a valid attachment. If there is no use case for a specific case type, the system goes up in the hierarchy chain until it finds a use case to use.

Use cases are stored in the Use Case (di_task_definition) table.

Extraction modes

A use case includes an extraction mode that determines how the data is extracted in the document task and how the task is processed. The mode changes the behavior of the fields in the Document Intelligence workspace.

DocIntel uses the following extraction modes

Document Intelligence use case extraction modes

Extraction mode	Definition
Recommendation	Provides recommendations for the extracted fields in the Document Intelligence workspace. Agents can choose the recommended value for a field or manually enter a value. All fields must be reviewed. Recommendations are ordered based on how confident the AI is in the prediction. As Document Intelligence continues processing your documents, recommendations can improve over time.

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Document Intelligence use case extraction modes (continued)

Extraction mode	Definition
Auto-fill	Adds values for the extracted fields in the Document Intelligence workspace. All fields must be reviewed. Auto-fill works only if the AI has enough confidence to make the prediction. You can change the confidence threshold by updating the **Auto-fill threshold** field in the use case.
Fully automated (Straight through processing)	DocIntel extracts the data for all fields and processes the document task if the confidence scores for all required fields are above the defined confidence threshold. DocIntel becomes more confident over time, as it processes more and more documents. Choose Fully automated mode for frequently processed documents or if you're confident in the system.

Extraction labels

In CRM Workspace, the fields on the Case form that contain Document Intelligence predicted values are identified with an AI icon (✨) and label. These fields also include an information icon that displays a message with additional context about the predicted values.

In Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with the message `Predicted from DocIntel`.

- For Fully automated mode, the message appears below each extracted field returned by the task. The values and messages for each field are added to the case before the agent views the case record.
- For the other extraction modes, the agent reviews the extracted values in the Document Intelligence interface, confirms or corrects values, and submits those values. The message then appears below the extracted fields.

Predicted field values

In CRM Workspace, the fields on the Case form that contain Document Intelligence predicted values are identified with an AI icon (✨) and label. These fields also include an information icon that displays a message with additional context about the predicted values.

In Core UI, the fields on the Case form that contain Document Intelligence predicted values are identified with the message `Predicted from DocIntel`.

Performance

The Document Intelligence for Customer Service feature needs time to identify cases with attachments, scan the attachments, and make recommendations for case fields. The response time also depends on factors such as case with attachment volume and data center location.

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The system displays notifications to the user for the following scenarios:

- If the extraction fails.
- If the extraction is too slow.
- If there are no attachments.
- If there are unexpected attachments.

How it works

When a case is created, Document Intelligence for Customer Service checks to see:

- If the case has one or more attachments.
- If the attachment types are specified in the *sn_csm_ml_task.case.docintel.parsing_supported_types* system property.

If yes, the feature:

- Identifies the right use case to use based on the case or case type and the use case integrations.
- Creates a task using the use case, the sys_id of each attachment, and the case reference.
- Sends the task, attachment sys_ids, and case reference as inputs to the prediction model.
- Uses optical character recognition (OCR) solutions to extract data from the documents.
- Sets the status of the task to Done once the solution has completed.
- If the extraction mode in the use case is set to Fully automated, the extracted values are added to the case.
- If the extraction mode is set to Autofill or Recommendation, the agent can validate the extracted values in the Document Intelligence workspace.

The agent can open a case and review the predicted fields or review the prediction task by selecting **Review in DocIntel** and opening the Document Intelligence workspace interface in a separate tab. From this interface, agents can:

- Review each predicted field.
- Confirm correctly predicted values.
- Update incorrect or missing values.
- Submit the changes.

Similar case recommendation

The Similar Case Recommendation feature enables customer service agents to quickly locate similar cases that offer valuable insights into the current issue.

This feature also suggests cases that might be related to major problems, helping agents provide more informed and efficient support.

With the Similar Case Recommendation feature, agents can:

- Identify similar cases.
- Copy resolution notes from resolved cases.
- Link the current case to a similar one.

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- View and submit the current case as a major case candidate. The system displays three similar open and resolved cases.
- View similar major cases first and link the current case as a child to a major case.

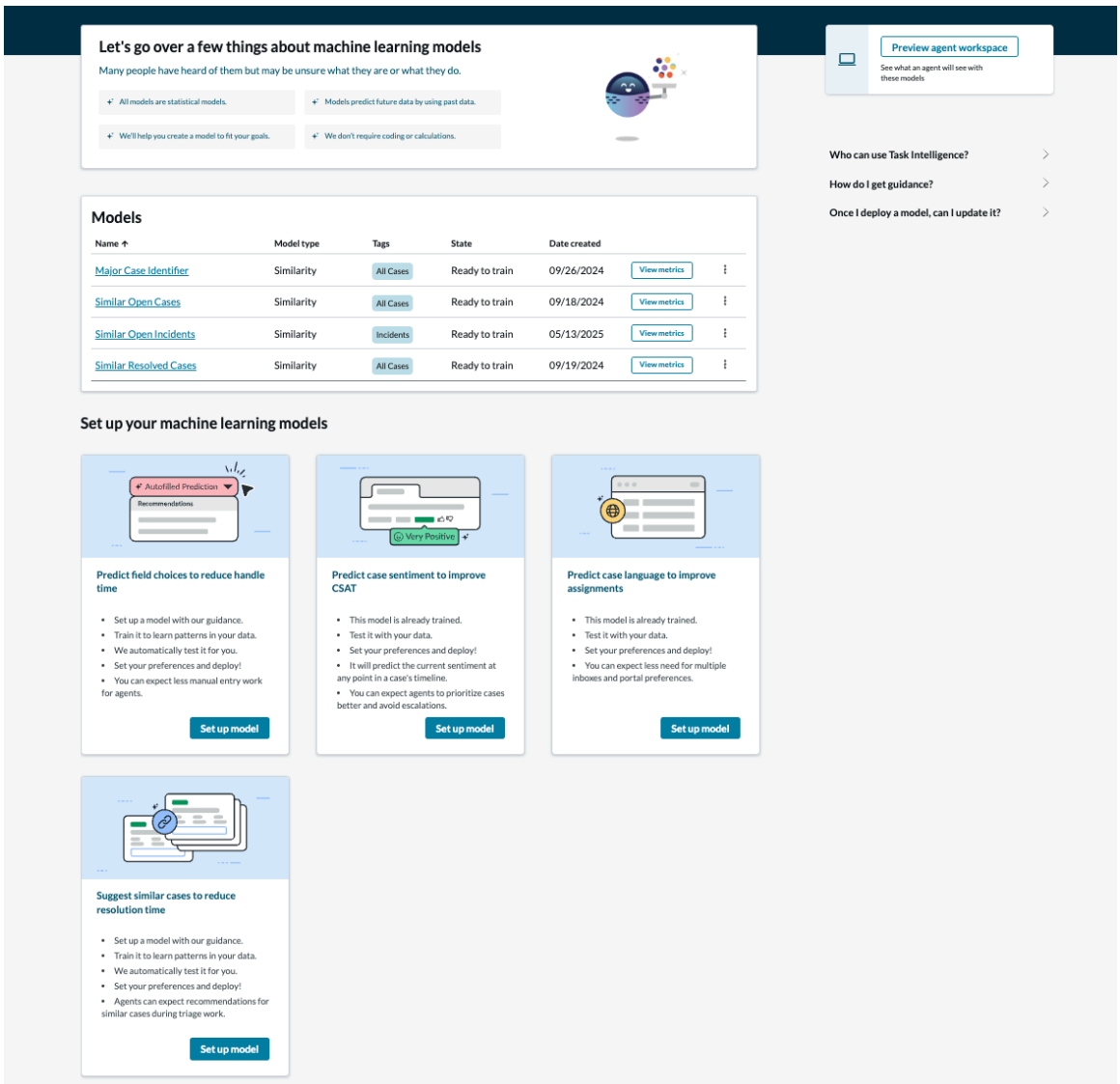
When using similarity models in the workspace, the agent can:

1. Open a case record.
2. Select the Recommendations tab in the contextual side panel.
3. Choose the Suggested Actions sub-tab to see:
   - A card to propose a major case and a card for similar major cases (if enabled).
   - Up to three similar open case cards (customer-configurable).
   - Up to three similar resolved case cards (customer-configurable).

For more info, see View similar case recommendations

Task Intelligence Admin Console

Use the Task Intelligence Admin Console to create, train, and deploy machine learning models that predict different types of information for case and interaction records.



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From the Admin Console, you can set up predictive models, preview the agent's experience, view when the models are active, and track model performance.

The Admin Console provides tools that you can use to create and implement machine learning models in just a few steps. Each model follows a six-step process.

Steps to create and implement machine learning models	
1. Select a model to use as a starting point.	Select the model based on what you want the model to do. For example: • Use the field prediction model to make field value predictions that you can use to categorize cases and interactions. • Use the case sentiment model to predict sentiment at any point from case creation to case resolution.
2. Define the purpose of the model.	Tell the model when you want it to make predictions and what you want it to predict. For example, predict the category and priority when a new case is created.
3. Select the data used to train the model.	Train the model using selected data, such as the text in the case short description and description, so it can learn patterns in the data. Then test the model to see how well it works.
4. Assess the model's results.	View test results to see how your well the model performed. These results indicate how a model will perform after being deployed.
5. Select preferences for prediction results.	Add predictions directly to record fields, show predictions as recommendations, or monitor predictions in the background.
6. Deploy the model.	Review your selections and start using the model.

You can also use the Task Intelligence Admin Console to access related applications. For more information about using the console, see the following topics:

- Create a model to predict record fields
- Create a model to predict case sentiment
- Create a model to detect case language
- Create a Document Intelligence use case

Machine learning model setup and behavior

Set up models to predict field values and sentiment for customer service cases.

Training a model

Training a machine learning model is when the model learns patterns in past data to make predictions for new data. Models are trained using a lot of data so that they can learn patterns and the large data set makes the learned patterns statistically significant.

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Setting up a field prediction model

Users with the ml_admin role can create and train a machine learning model to predict field values from the Task Intelligence Admin Console.

Using the field prediction model as a starting point, you can choose the training data set that the model learns from. The model can be trained using data from the following tables:

- Email [sys_email] table
- Case [sn_customerservice_case] table
- Tables that extend the Case table
- Interaction [interaction] table

Models can also be trained using data from email or case attachments.

You then direct the model to learn a pattern between two types of fields from that data:

- **Output fields** are the fields that you want your model to predict. For example, the Category and Priority fields for cases.
- **Input fields** are the fields that the model uses as a basis for predictions. For example, text in the subject and body of an email.

You can use the recommended input fields or you can modify these fields and add your own preferences.

If the model is configured to use text from attachments, the system performs the following steps when a case or interaction is created:

- The system checks the record for attachments with supported content types and file extensions. It ignores the attachments that have unsupported file extensions.
- If the record has attachments in a supported format, the system parses the text and sends it as an input to the categorization model, along with text from the input fields.
- If the record does not have attachments, or no attachments in a supported format, the system sends text from the input fields to the categorization model.

Supported content types and file extensions are stored in the *`sn_csm_ml_task.categorization.allowed_content_types`* system property. For more information, see Components installed with Task Intelligence for Customer Service.

Supporting multiple languages

Categorization supports multiple languages including attachments, if the models are configured to include attachments. The categorization model returns the predicted language and stores it in the **Detected Language** field in the Predictor Result [ml_predictor_results] table.

Setting up a case sentiment model

The case sentiment model is pre-trained with a large data set to learn communication patterns. This data comes from customer emails and case descriptions and comments and reflects typical communication between agents and customers.

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- **Email**: The model uses the text in the subject and body of the initial email to predict sentiment when the case is created. Text from the body of subsequent emails is used to update the prediction.
- **Cases**: The model uses the text in the case short description and description to predict sentiment when the case is created. Comments added to the case are used to update the prediction.

The case sentiment model supports case types. When setting up a sentiment model, you select the table on which to run sentiment analysis. You can select:

- The Case table
- Tables that extend the Case table

Note: The sentiment analysis feature supports one level of custom extension from the Case table.

Install the Task Intelligence for Customer Service application

You can install the Task Intelligence for Customer Service application (com.snc.csm_ml_task) if you have the admin role.

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.
- Review the Task Intelligence for Customer Service application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.
- The minimum version of the workspace required to support Task Intelligence for Customer Service application is CSM and FSM Configurable Workspace Foundation (sn_cwf_wrkspc): 24.2.1.
- To enhance ML functionality, we need to set up three Access Control Lists (ACLs) within the Customer Service application. These ACLs are essential for granting the platform_ml_read role the necessary read access to the sn_customerservice_case table and its associated fields. For more information, see KB1705485

Role required: ti_admin

About this task

The following items are installed with Task Intelligence for Customer Service:

- Store applications: Task Intelligence for Customer Service
- Roles
- Tables
- Properties
- Flows
- Scheduled jobs

For more information, see Components installed with Task Intelligence for Customer Service.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Task Intelligence for Customer Service application (com.snc.csm_ml_task) using the filter criteria and search bar.

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

   In the list next to the **Install** button, the versions that are available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Components installed with Task Intelligence for Customer Service

Several types of components are installed with the Task Intelligence for Customer Service application, including tables, roles, properties, flows, and scheduled jobs.

Tables

The Task Intelligence for Customer Service application uses the following tables.

Tables installed with the Task Intelligence for Customer Service application

Table	Description
ML Solution [ml_solution]	The ML Solution table stores trained machine learning solutions. Activating the Task Intelligence for Customer Service application (com.snc.csm_ml_task) creates a record in this table for the pre-trained sentiment analysis machine learning solution: *`ml_x_snc_global_global_sentiment`*.
ML Sentiment [ml_sentiment]	This table stores machine learning sentiment information and includes the following fields: • **Original sentiment**: The sentiment that is predicted when the case is created. • **Current sentiment**: The sentiment that is predicted when the case is updated. • **Sentiment over time**: Displays the sentiment trend prediction as an agent works to resolve the case. To

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Tables installed with the Task Intelligence for Customer Service application (continued)

Table	Description
	be able to calculate a value for this field, there needs to be a minimum of two sentiment predictions. The system uses the following formula used to determine the sentiment trend: `(currentSentiment - originalSentiment) > 0 ?'improving' :'declining';`
Predictor Result [ml_predictor_results]	This table stores prediction results and feedback for record categorization, sentiment analysis, and language detection. This includes skipped and failed predictions that result from prediction requests. For case categorization: • The **Default confidence** and **Predicted confidence** fields store confidence values returned by the categorization machine learning models. • For cases created from email, the **Source ID** field includes a reference to the sys_email record and the **Predicted Table** field includes a reference to the sys_email table. For sentiment analysis: • The default value in the **Predicted correctly** field for each sentiment prediction is set to true. • The **Final input value** and **Final output value** fields remain empty because sentiment analysis predictions do not collect feedback from agents. For language detection: • The Predictor Result table stores the prediction results from the Language Detection Service spoke. • The **Detected Language** field stores the language returned by the Language Detection Services spoke. The Predictor Result table includes the **Skipped** field, which is a true|false field. • **True**: The prediction was skipped. • **False**: The prediction was not skipped. For more details about skipped predictions, see Logic for Skipped field values below. **Note:** The Predictor Result list includes a filter on the **Capability** field, which displays results where the capability is Classification. Remove this filter to display all of the prediction results.

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Tables installed with the Task Intelligence for Customer Service application (continued)

Table	Description
Case [sn_customerservice_case]	The Case table stores customer service case records. This table is the recipient for case categorization predictions. The **Language** field has been added to the Case table. This field is a reference to the Language [sys_language] table. This field is populated with the prediction made by the language detection spoke and stores the language that was used to create the email or case. The Case table is added with the Case Management Core (com.sn_customerservice) plugin.
Task [task]	The Task table is one of the core tables provided with the ServiceNow base system. The sentiment analysis feature adds the **Sentiment** column to the Task table. This column is a reference to the Task ML Sentiment [task_ml_sentiment] table.
Task ML Sentiment [task_ml_sentiment]	This table stores sentiment predictions. The reference to the prediction record is stored in the **Sentiment** field in the Task table. This table is an extension of the ML Sentiment [ml_sentiment] table. The **Task** column in the Task Sentiment table is a reference to the Task [task] table and is used for domain separation.
Task Skills [task_m2m_skill]	The Task Skills table stores skills for the Customer Service Management application. The language detection feature links language skills to new customer service cases by saving the detected language in the Task Skills table. The Task Skills table lists customer service cases and the language skill detected and assigned to each case.

Logic for Skipped field values

Prediction preference	Top 1 prediction	Top 3 (at least 1 prediction)	Skipped
Autofill	Yes	Yes	False
	Empty	Yes	True
Recommendations	Yes	Yes	False
	Empty	Yes	False
	Empty	Empty	True

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Logic for Skipped field values (continued)

Prediction preference	Top 1 prediction	Top 3 (at least 1 prediction)	Skipped
Monitor only	Yes	Yes	False
	Empty	Yes	False
	Empty	Empty	True
Prediction unsuccessful	NA	NA	True
Prediction error	NA	NA	True

Tables installed with Document Intelligence for Customer Service

The Document Intelligence for Customer Service application uses the following tables

Tables installed with the Document Intelligence for Customer Service application

Table	Description
DocIntel Use Case [di_task_definition]	Stores Document Intelligence use cases for the Case table (sn_customerservice_case) or case type tables that extend the Case table.
DocIntel Task [di_task]	Stores Document Intelligence tasks. The **is_stp** field controls straight through processing. When this field is set to true, straight through processing is enabled for the task. The **agent_input** field is set to true if an agent makes changes to predicted values in the DocIntel tab. **Note:** You can track tasks from the ML Solusions table (ml_solution.list).
Integration Setup [di_integration_setup]	Stores use case filters that are applied to cases. The **Target Table** field stores the target for the predicted fields, either the Case table (sn_customerservice_case) or a case type table.
Field [di_key]	Stores the keys to be extracted by Document Intelligence.
Field Value [di_extracted_value]	Stores the extracted values for the keys in a use case task.

Roles

The Task Intelligence for Customer Service application includes the following roles.

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Roles installed with Task Intelligence for Customer Service

Role	Description	Contains roles
Task Intelligence admin [sn_csm_ml_task.ti_admin]	Can create, train, and retrain machine learning models. This role can also deploy and delete models.	• sn_docintel.admin • sn_ti_admin.tia_admin • sn_customerservice.case_viewer
Task Intelligence analyst [sn_csm_ml_task.ti_analyst]	Can create, train, and retrain machine learning models.	• sn_customerservice.case_viewer • sn_ti_admin.tia_analyst • sn_docintel.manager
[sn_ti_admin.tia_admin]		• ml_admin • platform_ml_read
[sn_ti_admin.tia_analyst]		ml_admin
[sn_ti_admin.tia_user]		ml_report_user
Task sentiment viewer [task_ml_sentiment_viewer]	Provides read access to records in the Task Sentiment [task_ml_sentiment] table if the user has read access to the associated task records. This role is added to the following roles: • sn_customerservice_agent • sn_customerservice.consumer_agent	

Note: The sn_docintel.extraction_agent role is added to the customer service agent role (sn_customerservice_agent) and the consumer service agent role (sn_customerservice_consumer_agent).

Properties

The Task Intelligence for Customer Service application includes the following properties.

Properties installed with Task Intelligence for Customer Service

Property	Description
sn_csm_ml_task.logging.verbosity	The log verbosity for the Task Intelligence for Customer Service application. This property has the following values:

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Properties installed with Task Intelligence for Customer Service (continued)

Property	Description
	• **error**: Show only critical errors which may prevent the search from completing. • **warn**: Show warning which indicates possible unexpected changes in behavior while searching. Also shows errors. • **info**: Show progress messages as the Code Search application searches for results. Also shows errors and warnings. • **debug**: Show information that may be useful while debugging the application. Also shows errors, warnings, and info messages. • **off**: Do not generate logs. The default setting is info.
Categorization properties	
sn_csm_ml_case.case.categorization.enable	Enables categorization predictions for customer service cases. The default setting is false.
sn_csm_ml_task.categorization.attachment.max_size	Determines the maximum size of an attachment that can be parsed by categorization machine learning models. The maximum supported size is 500kb. The default setting is 450kb.
sn_csm_ml_task.categorization.allowed_content_types	Controls the content types and file extensions that are supported by the ML predictor for categorization with attachment. By default, the following attachment types can be used with attachment-based case categorization predictions: pdf, xls, xlsx, docx, and csv. To configure content types: • Leave the property blank to allow all of the supported file extensions. This is the default setting. • Create a subset of the default values by entering a comma-separate list of content types and file extensions. For example, `application/pdf,text/csv`.
sn_csm_ml_task.categorization.flow_start_time.threshold	Sets the max waiting threshold for categorization predictions that include attachments. The default value is 10 minutes.

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Properties installed with Task Intelligence for Customer Service (continued)

Property	Description
	If the call to the API does not return a prediction before the maximum waiting threshold is reached, predictions are made without the attachment text. These predictions are based on text from the subject and body of the email or the case short description and description.
sn_csm_ml_task.categorization.case.delay_connection_time	Adds a set time delay before fetching valid attachments for Task Intelligence when cases are created from email.
sn_csm_ml_task.case.categorization.enable_remove_inactive	Enable this property to remove inactive field choices from predictions. The default setting is false.
Sentiment analysis properties	
sn_csm_ml_task.case.sentiment.mlpredictor.enabled	Enables sentiment predictions for customer service cases. The default setting is false. To enable sentiment predictions, set this property to true. **Note:** This property is automatically set to true when a sentiment model is trained and deployed from the Task Intelligence Admin Console.
Language detection properties	
sn_csm_ml_task.case.language.mlpredictor.enabled	Enables language detection for customer service cases. The default setting is false. To enable language detection, set this property to true. **Note:** This property is automatically set to true when a language detection module is tested and deployed from the Task Intelligence Admin Console.
sn_csm_customerservice.case.ml.language.detection.threshold	Controls the threshold for language prediction. The default value for this property is 0.70. Predictions with a confidence level greater than the threshold are saved in the Predictor Results (ml_predictor_results_task) table and the Task Skills (task_m2m_skill) table. Predictions with a confidence level less than the threshold are only saved in the Predictor Results (ml_predictor_results_task) table.

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Properties installed with Task Intelligence for Customer Service (continued)

Property	Description
sn_csm_ml_task.case.languagedetection.confidence_threshold	Stores the confidence threshold for the language detection feature. The default value is 0.7.
Document Intelligence properties	
sn_csm_ml_task.case.docintel.mlpredict	Enables Document Intelligence for Customer Service Management. **Note:** This property is activated automatically when the user creates a use case.
sn_csm_ml_task.case.docintel.parsing_supported_types	Contains a list of the supported attachment types: *image/png,image/jpeg,application/pdf*
sn_csm_ml_task.straight_through_processing_max_waiting_threshold	Defines the maximum waiting time for a straight through processing task to finish. The default time is 5 minutes. If a use case is configured to use the straight through processing prediction mode, the agent can see the relevant fields on the Case form automatically populated within 5 minutes of case arrival. If this threshold is exceeded, the values are skipped. However, the agent can still view the task in the DocIntel tab and manually extract the values.
sn_csm_ml_task.case.delay_attachments	Waits for several milliseconds before fetching valid attachments for Task Intelligence for Customer Service when a case is created from email. **Note:** This property is disabled by default. If you notice that attachments are being missed for cases created from email, enable this property.

Flows

The Task Intelligence for Customer Service application includes the following flows.

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Flows installed with Task Intelligence for Customer Service

Flow	Description
Task Intelligence Sentiment [new_task_intelligence]	This flow is inactive out of box and is activated after setting up models on the Task Intelligence Admin Console.
Task Intelligence Sentiment Case Update [task_intelligence_case_update_flow]	This flow is inactive out of box and is activated after setting up models on the Task Intelligence Admin Console.
Task Intelligence Inbound Email Reply [task_intelligence_inbound_email_reply]	This flow is inactive out of box and is activated after setting up models on the Task Intelligence Admin Console.
Task Intelligence Case Language Detection [task_intelligence_case_language_detection]	Language detection determines the language used to create a case. Depending on configuration, the system can add this value to the **Language** field on the Case form. This field is a reference to the Language [sys_language] table. It can also add the language as a skill to the Task Skills related list on the Case form. This flow is automatically activated when a language detection module is trained and deployed from the Task Intelligence Admin Console.
Task intelligence - DocIntel at case creation	This flow is inactive out of box.
Task Intelligence - DocIntel Process Extracted Values	This flow is inactive out of box.

Machine learning models

The sentiment analysis feature uses the *ml_x_snc_global_global_sentiment* machine learning model. This model is provided with the Task Intelligence for Customer Service application.

Scheduled job for categorization solution training

The system administrator can run the *Categorization solution training* scheduled job on demand.

Note: It is recommended that you import a training data set to the Case table [sn_customerservice_case] to support the initial training of the Categorization machine learning model. The training data set should be tailored to the Case fields that you want to predict and include additional case records that have the correct labels (i.e., the expected field values) for the specific fields being predicted. By creating this data set, you leverage your own data to train the algorithm to predict on the fields you select.

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The system administrator can set the following parameters before running the scheduled job.

Parameters for Scheduled jobs

Parameter	Description
trainNewSolution	Set to true to train a new solution. Set to false to retrain a solution and add the name of the solution in the *existingSolutionName* parameter.
inputFields	The fields that are used to train the model. For example: `["short_description","description"];`
outputFields	The fields to be predicted. For example: `["priority","category"];`
encodedQuery	The query that is applied to the data used for training.
existingSolutionName	The name of an existing solution. Add a name to this parameter if retraining a solution.

To determine when a solution is ready to be used for categorization predictions, the system administrator can check the status of the scheduled job. Once the state is Solution Complete, the solution can be used for predictions.

Scheduled job for publishing previously deployed models

The system administrator can run the *Deploying Task Intelligence for Customer Service Management* after upgrading the Task Intelligence for Customer service plugin.

This scheduled job verifies if there are previously deployed models for record categorization, sentiment analysis, language detection, and Document Intelligence and publishes these models.

Configure Task Intelligence for Customer Service

Install the Task Intelligence for Customer Service application and configure the different features: record categorization, language detection, Sentiment Analysis, and Document Intelligence for Customer Service.

Install and configure Task Intelligence features

Complete the following tasks to install Task Intelligence for Customer Service and configure the features.

Task Intelligence feature configuration

Task	Description
Install the Task Intelligence for Customer Service application	You can install the Task Intelligence for Customer Service application (com.snc.csm_ml_task) if you have the admin role.

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Task Intelligence feature configuration (continued)

Task	Description
Configure record categorization	Activate the required plugins and import training data. Then you can create and train a model to predict field values.
Configure Sentiment Analysis	Activate the required plugins, enable the sentiment analysis property, and assign roles. Then you can train a model to predict case sentiment.
Configure language detection	Activate the required plugins and the ServiceNow translator to use the language detection feature. Then you can set up a model to detect the case language.
Configure Document Intelligence for Customer Service	Enable Document Intelligence for Customer Service and create use cases to extract data.

Set up and deploy Task Intelligence models

Once you have completed the configuration tasks, you can use the Task Intelligence Admin Console to set up and deploy models for record categorization, sentiment analysis, and language detection. You can also use the Task Intelligence Admin Console to access the Document Intelligence Admin interface, which you can use to create document processing use cases.

Model deployment in Task intelligence

Task	Description
Create a model to predict record fields	Create and train a model to predict fields for cases and interactions.
Create a model to predict case sentiment	Edit and test the pre-trained sentiment model to predict sentiment for customer service cases.
Create a model to detect case language	Edit and test the pre-trained model to detect the language used to create customer service cases.
Create a Document Intelligence use case	Create a use case to identify the information to extract from email and case attachments.
Create a model to predict similar cases	Test and edit the pre-trained similar cases model for predicting similarity in customer service cases and create a new model for custom cases.
Edit a model	Edit the case models that have already been trained and deployed. Change the model configurations, view the updated training results, and redeploy the model.
Export a model	Export a Task Intelligence model to another instance.
Create a custom similar case model	Set up a training model to help it recognize similarities between two types of tables by comparing their fields. The model looks at the prediction fields of a prediction table and the training fields of a training table. It uses the similarities in these fields to predict similar records.

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Related topics

Task Intelligence for Customer Service

Use Task Intelligence for Customer Service

Configure record categorization

Activate the required plugins, import training data, and create and train a model to predict field values for case and interaction records.

Steps to configure record categorization

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see Predictive Intelligence.
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to create and train categorization machine learning models. This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Case Management Core (com.sn_customerservice) • Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Import a training data set.	You can use the record categorization feature with the Case table [sn_customerservice_case], tables that extend the Case table, and the Interaction table [interaction]. It is recommended that you import a training data set into the desired table to support the initial training of a categorization model.

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Steps to configure record categorization (continued)

Step	Description
	Note: This data should include case types if you have tables that extend the Case table. The training data set should be tailored to the fields that you want to predict. It should also include additional records that have the correct labels (for example, the expected field values) for the fields being predicted. Creating a training data set enables you to leverage your own data to train the algorithm to predict on the fields you select. **1.** Identify the table and the fields that you want your model to predict. **2.** Select the table and records for training the model. **3.** Identify the fields in the selected table as the input values to be used for training the model.
Set up and deploy at least one categorization model.	For details, see Create a model to predict record fields.

Related topics

Record categorization

Configure Sentiment Analysis

Activate the required plugin, enable the sentiment analysis property, and assign roles to use the sentiment analysis feature.

Follow the steps in the table below to configure the sentiment analysis property for cases.

Sentiment analysis configuration steps

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see Predictive Intelligence.
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to leverage machine learning algorithms in Customer Service Management. The sentiment analysis feature is included with this application.

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Sentiment analysis configuration steps (continued)

Step	Description
	This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Case Management Core (com.sn_customerservice) • Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Configure the Case list and Case form to display the sentiment analysis fields.	The sentiment analysis feature adds the following fields: • **Original sentiment** • **Current sentiment** • **Sentiment over time** Configure these fields for each of the following interfaces as needed: • CSM Configurable Workspace • CSM Agent Workspace • Core UI Platform interface
Use the Task Intelligence Admin Console to create and deploy a sentiment model.	See Create a model to predict case sentiment.

Configure sentiment analysis fields

The sentiment analysis feature uses the following fields to display sentiment prediction information on Cases list and Case form:

- Original sentiment
- Current sentiment
- Sentiment over time

Add the sentiment fields to Case list views and to the Case form for CRM Workspace, CSM Agent Workspace, and Core UI.

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- In CRM Workspace, these fields appear as secondary values in the configurable form header. You can configure secondary values to display either below the primary value at the top of the form or in the Record Information tab in the contextual side panel. (For more information, see Display the form ribbon and form header secondary values in the Contextual side panel.)
- In CSM Agent Workspace, these fields appear in the Case form header.
- In Core UI, these fields appear on the Case form.

Sentiment analysis fields

Field	Description
Original sentiment	The sentiment that is predicted when a case is created. The values for this field include: • Positive • Neutral • Negative
Current sentiment	The most recent sentiment prediction for the case. This prediction is assessed when a case is created and updated. The values for this field include: • Positive • Neutral • Negative When a case is created, the **Original sentiment** and **Current sentiment** are assigned the same value. When a case is updated, the **Original sentiment** remains the same and the **Current sentiment** is updated with the most recent prediction.
Sentiment over time	A trend indicator that reflects the change in sentiment as a case is updated. The values for this field include: • Improving • Neutral • Declining This field requires a minimum of two sentiment predictions in order to calculate a value.

Configure sentiment fields for CSM Agent Workspace

To add the sentiment fields to the Case list:

1. Enter **sys_aw_list.list** in the application navigator and press **Enter**.
2. Click **All** from the Case [sn_customerservice_case] table.
3. Click the lock icon next to the **Columns** field.
4. Select and move the sentiment fields from the **Available** column to the **Selected** column.

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5. Click the lock icon again.
6. Click **Update**.

To add the sentiment fields to the Case form header:

1. Select **CSM Workspace** as the application scope.
2. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.
3. In the Table column of the Form Headers list, select **sn_customerservice_case**.

   If adding sentiment fields for a case type, select the case type table that extends the Case table.

4. Click **New** in the Secondary Values related list.
5. Select the desired sentiment field in **Field** field and click **Submit**.
6. Repeat step 5 for the remaining sentiment fields.
7. Click **Update** on the Form Header form.

Configure sentiment fields for CSM Configurable Workspace

To add the sentiment fields to the Case list:

1. Enter **sys_ux_list.list** in the application navigator and press **Enter**.
2. Click **All** from the Case [sn_customerservice_case] table.
3. Click the lock icon next to the **Columns** field.

   If adding sentiment fields for a case type, select the case type table that extends the Case table.

4. Select and move the sentiment fields from the **Available** column to the **Selected** column.
5. Click the lock icon again.
6. Click **Update**.

To add the sentiment fields to the Case form header:

1. Select **CSM Workspace** as the application scope.
2. Navigate to **All** > **Now Experience Framework** > **Configuration Settings** > **UX Form Header**.
3. In the Table column of the Form Headers list, select **sn_customerservice_case**.
4. Click **New** in the Secondary Values related list.
5. Select the desired sentiment field in **Field** field and click **Submit**.
6. Repeat step 5 for the remaining sentiment fields.
7. In the UX header Configurations list, click **Edit**.
8. In the **Collection** field, add **CSM/FSM Configurable Workspace Header Config**.
9. Click **Update** on the Form Header form.

Configure sentiment fields for Core UI

To add the sentiment fields to the Case list:

1. Navigate to **Customer Service** > **Cases** > **All**.
2. Right-click the list header and select the desired list view.

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3. Right-click any column heading and select **Configure** > **List Layout**.
4. Select and move the fields from the **Available** column to the **Selected** column.
5. Click **Save**.

To add the sentiment fields to the Case form:

1. Navigate to **Customer Service** > **Cases** > **All**.
2. Open a case.
3. Right-click the form header and select **Configure** > **Form Layout**.
4. Select and move the fields from the **Available** column to the **Selected** column.
5. Click **Save**.

Related topics

Sentiment Analysis

Configure language detection

Activate the required plugins and flows to use the language detection feature.

For more information about the languages supported by language detection, see this topic: Languages supported by Task Intelligence.

Follow the steps in the table below to configure the language detection feature for cases.

Language detection configuration steps

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see: • Predictive Intelligence • Machine learning solutions for Customer Service Management
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to leverage machine learning algorithms in Customer Service Management. The sentiment analysis feature is included with this application. This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Case Management Core (com.sn_customerservice) • Skills Management (com.snc.skills_management)

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Language detection configuration steps (continued)

Step	Description
	• Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Activate the ServiceNow translator.	To activate the translator: 1. Navigate to **Dynamic Translation** > **Translator Configurations**. 2. Select ServiceNow in the list of configurations. 3. Enable the **Active** check box and click **Update**.

Related topics

Language detection

Configure Document Intelligence for Customer Service

Enable Document Intelligence for Customer Service and create use cases to extract data.

Document Intelligence for Customer Service configuration steps

Step	Description
Ensure that your instance is set up for Predictive Intelligence (PI).	Predictive Intelligence is a ServiceNow platform feature that provides a layer of artificial intelligence, which serves as a framework for machine learning models. For more information, see Predictive Intelligence.
Activate the Task Intelligence for Customer Service application (com.snc.csm_ml_task).	The Task Intelligence for Customer Service application enables customers to create use cases for Document Intelligence and extract relevant information from PDF and image files. This application automatically activates the following plugins: • Predictive Intelligence for Customer Service Management (com.snc.csm_ml) • Case Management Core (com.sn_customerservice)

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Document Intelligence for Customer Service configuration steps (continued)

Step	Description
	• Skills Management (com.snc.skills_management) • Dynamic Translation (com.glide.dynamic_translation) • ServiceNow Language Detection Service Spoke (com.glide.language_detection_spoke) • Predictive Intelligence - Task Intelligence (com.glide.platform_ml_task) • Admin Center for Task Intelligence (com.sn_ti_admin)
Activate the Document Intelligence Admin application (com.snc.docintel_admin)	The Document Intelligence Admin application enables customers to create and configure use cases for extracting data. Activating this application automatically activates the properties and flows used by Document Intelligence for Customer Service.
(Optional) Configure the sn_csm_ml_task.case.docintel.parsing_supported_types system property.	Supported attachment types for Document Intelligence include: • image/png • image/jpeg • application/pdf You can configure the property to use a subset of these attachment types.
Use the DocIntel Admin experience to create one or more use cases.	• Create a use case that identifies the information to extract from email and case attachments. • Define the fields to be extracted. • Select conditions for a use case that tell the Document Intelligence feature when to run. For more information, see Create a Document Intelligence use case.

Document Intelligence for case types

When you create a case type that extends the Case [sn_customerservice_case] table, you need to configure the **Review in DocIntel** UI action for the case type table.

Related topics

Document Intelligence for Customer Service

Review and submit values predicted by Document Intelligence

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Create a model to predict record fields

Create and train a model to predict fields for case and interaction records.

Before you begin

Role required: ml_admin, ti_admin

About this task

The field prediction model is a guide that includes some recommended settings. You can use these settings, such as the recommended input fields, or add your own preferences.

You can create and train multiple field prediction models for cases, case types, and interactions.

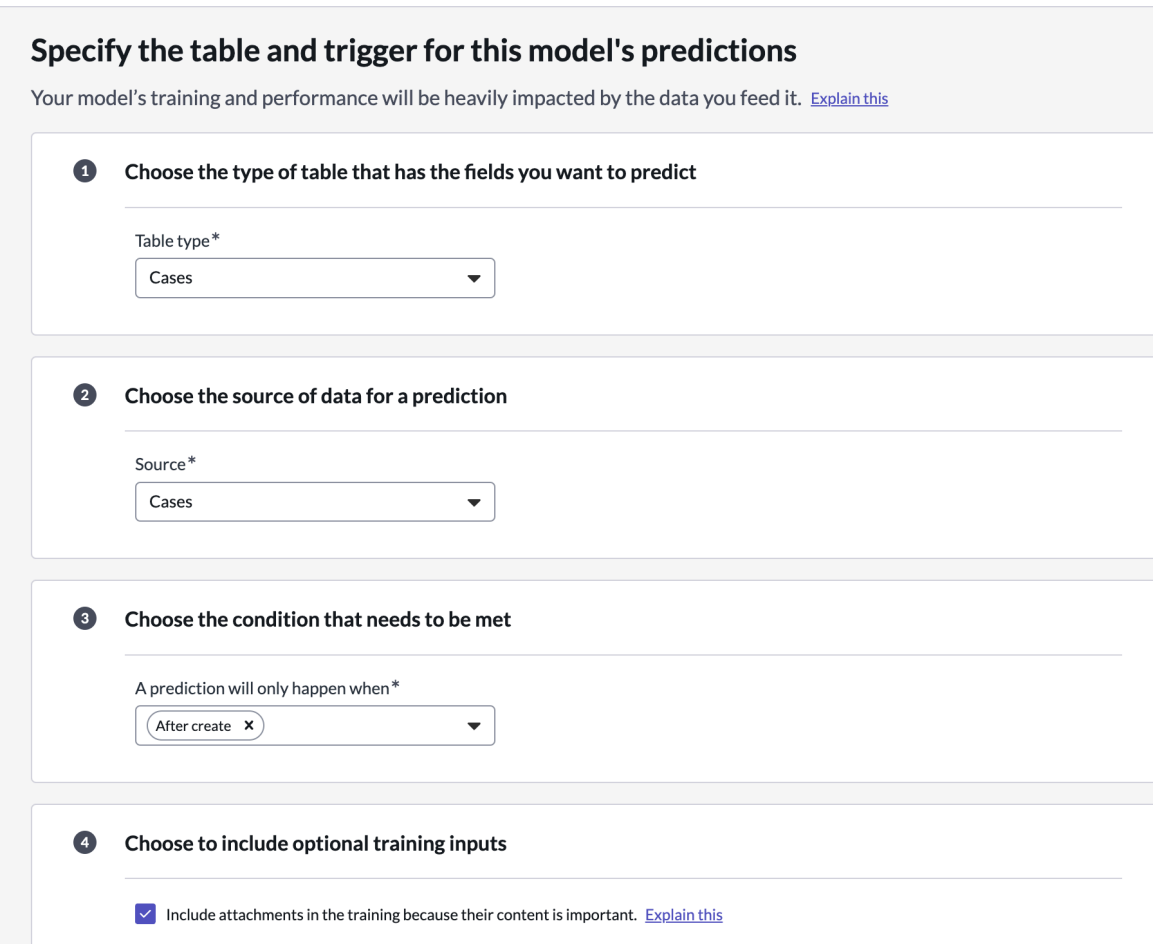
Set up your model

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. Select **Set up model** on this model: **Predict field choices to reduce handle time**.

   This opens the model and displays the first of five pages. Each page in the model asks you questions and helps you select the information you need to build an effective model.

Define the purpose

Select the table and the trigger for the model's predictions.



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You can have the model predict case or interaction fields when a new customer email arrives or when an interaction is created. Base your decision on the data that your model should use to make the predictions.

Select the table and trigger	
Choose the type of table that has the fields you want to predict	Select the table type: • Cases • Interactions The model uses data from the selected table to make predictions.
Choose the moment or channel that should trigger a prediction	Select the trigger for the prediction: • Cases • Emails • Interactions
Choose to include optional training inputs	Enable the check box to include attachments when training the model. Email and record attachments can have information that is useful for routing records correctly.

1. Choose a table type for the model.
2. Choose the prediction trigger.
3. If desired, enable the check box to include attachment data.

   Include text from email or record attachments if this information is useful for making predictions. The model can evaluate attachment data, along with email or record text, to make predictions.

4. Select **Save & continue**.

Train your model

Select the input fields and output fields so your model can learn patterns. Output fields are the fields that you want the model to predict. Input fields are the fields that the model uses to make predictions.

Selecting this information tells the model what to look for during training.

Note: You can use the recommended settings or select different ones.

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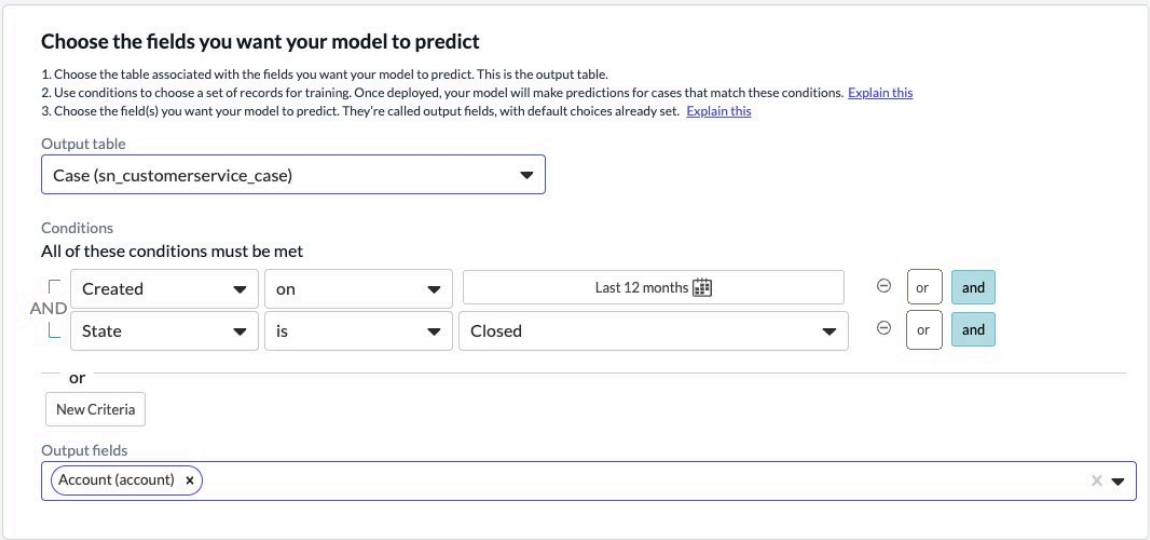
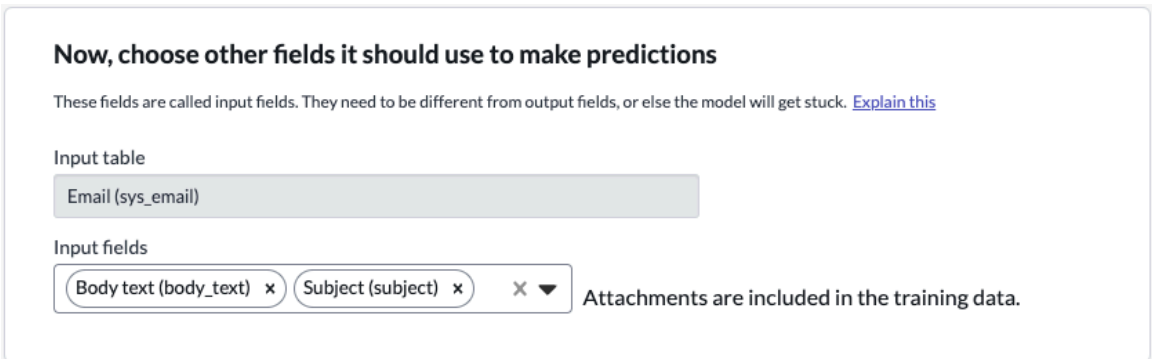


1. Provide a name for the model.
2. Choose the output table and the output fields for the model to predict.
3. Select conditions to choose a set of records for training.

   The selected conditions determine both how the model is trained and act as a filter for the conditions that a record has to meet in order for predictions to be made.

4. Select the fields in the training data that the model should use to make the predictions (input fields).



5. Choose the input fields.
6. Review the resulting number of cases in the training data based on the selected conditions.

   The model needs a minimum of 500 records for effective training. If this minimum number isn't available, try selecting different conditions.

7. Select **Launch training**.

   Training can take some time, particularly if you are training the model on a large amount of data. You can request that the system send you an email when the training is done.

Assess your model

Assess the results from the training and view sample results for the predicted fields. Reviewing the results gives you a preview of how your model will perform after being deployed.

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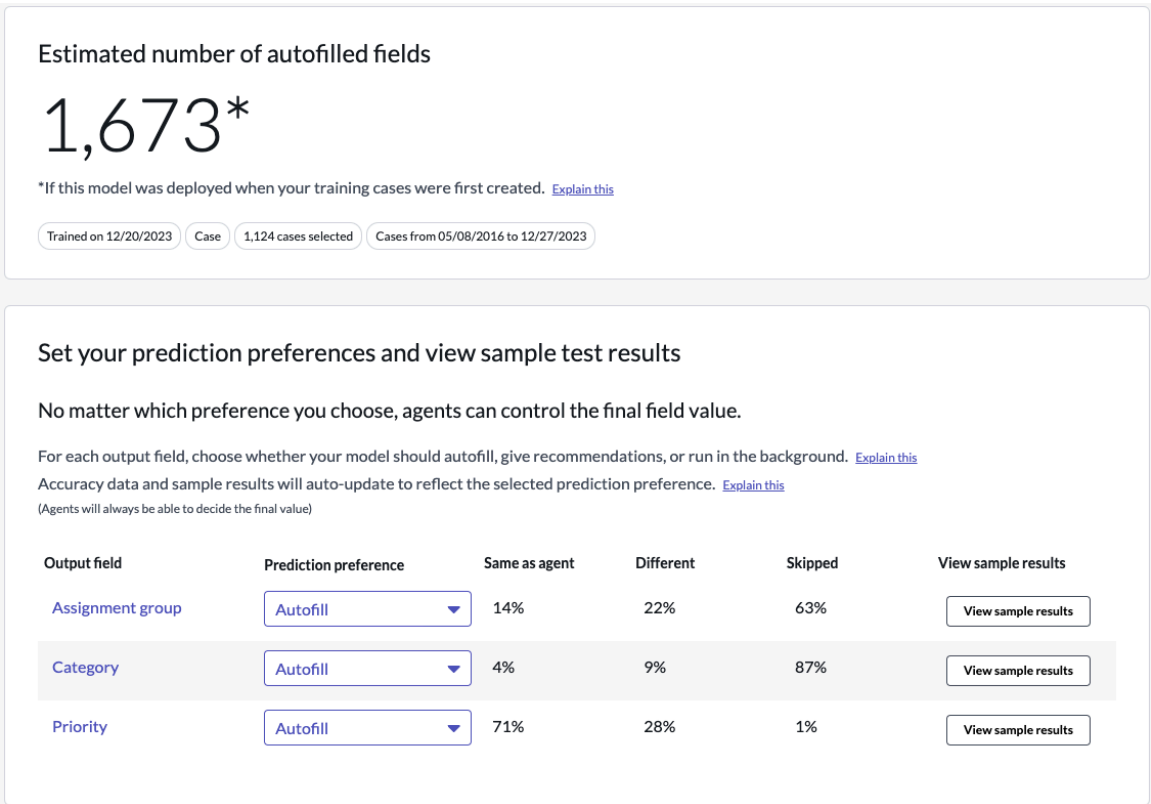
Select the prediction preference for each field. The model provides flexible options to autofill field values, provide recommendations for field values, monitor only, or turn off predictions depending on the sensitivity of those fields.



1. Select a **Prediction preference** for each enabled field.

Autofill	Adds the best predicted value to the field on the record.
Recommendations	Shows the recommended value in a message below the field.
Monitor only	The system makes the field predictions and stores the information in the Predictions History but does not add any information to the case records.
Turn off predictions	Turns off predictions for the field.

2. Select **View sample results** to see sample results for each predicted field.
3. Select **Save & continue**.

Deploy your model

Review your choices from the previous pages and information about how the model was trained. Then you can select **Deploy** to deploy the model.

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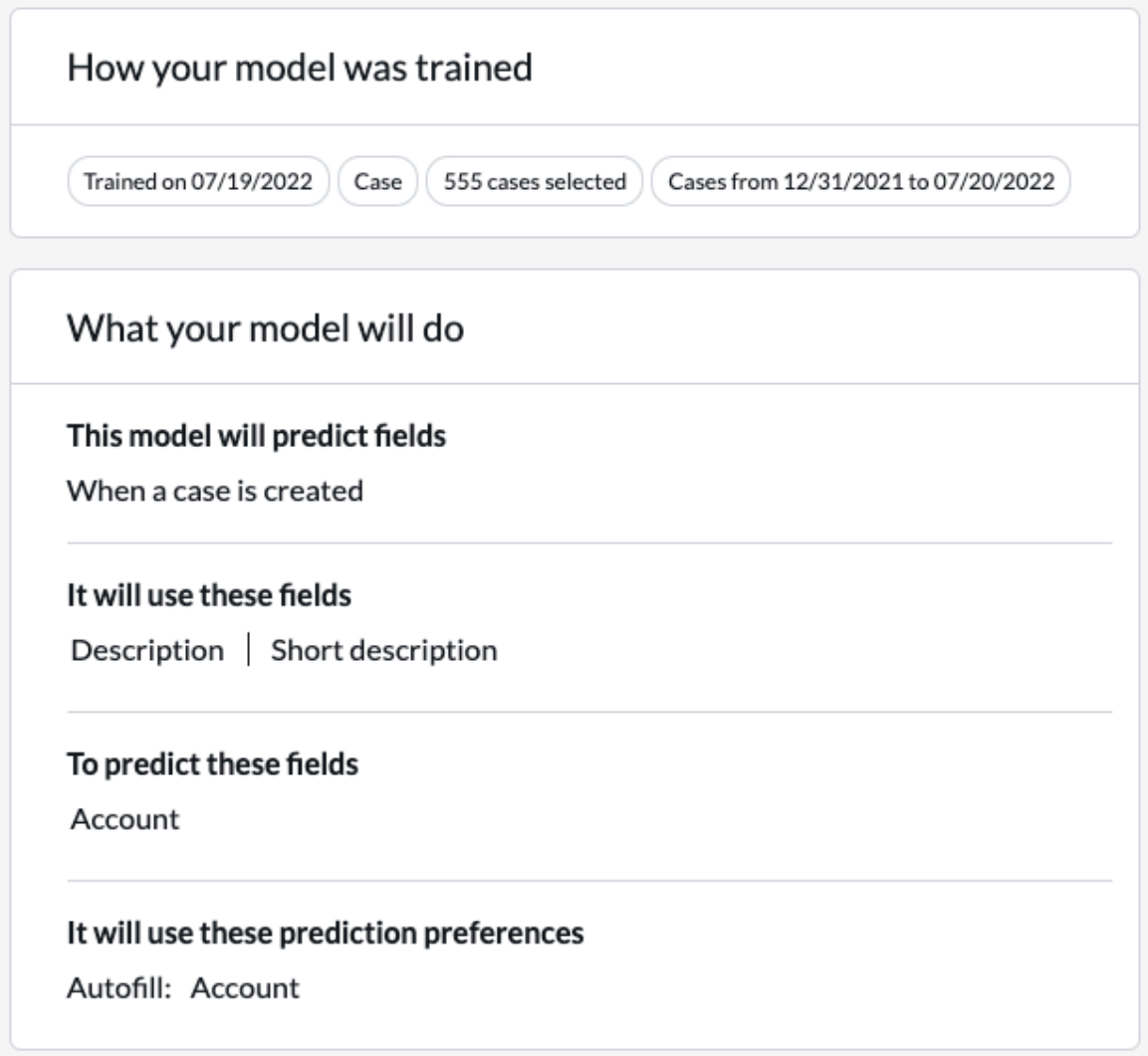

Create a model to predict case sentiment

Edit and test the pre-trained sentiment model to predict sentiment for customer service cases.

Before you begin

Role required: ml_admin, ti_admin

About this task

The case sentiment model is pre-trained with a large data set to learn communication patterns. You select a set of records to test the model and then view the results before deploying.

Set up your model

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. Select **Edit model** on this model: **Predict case sentiment to improve CSAT**.

   This opens the model and displays the first of five pages. Each page in the model asks you questions and helps you select the information you need to build an effective model.

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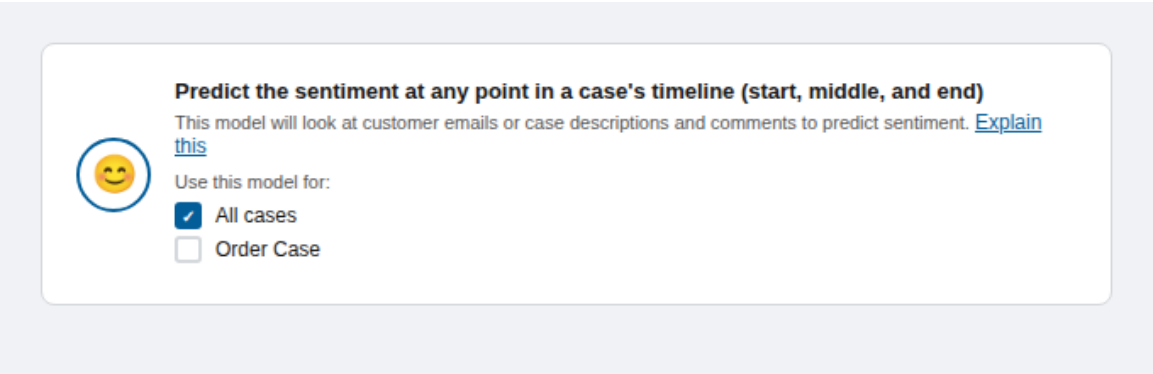
Define the purpose

Tell the model when you want it to make predictions.



The sentiment model is pre-trained with a large data set to understand communication patterns. This data comes from customer emails and from case descriptions and comments.

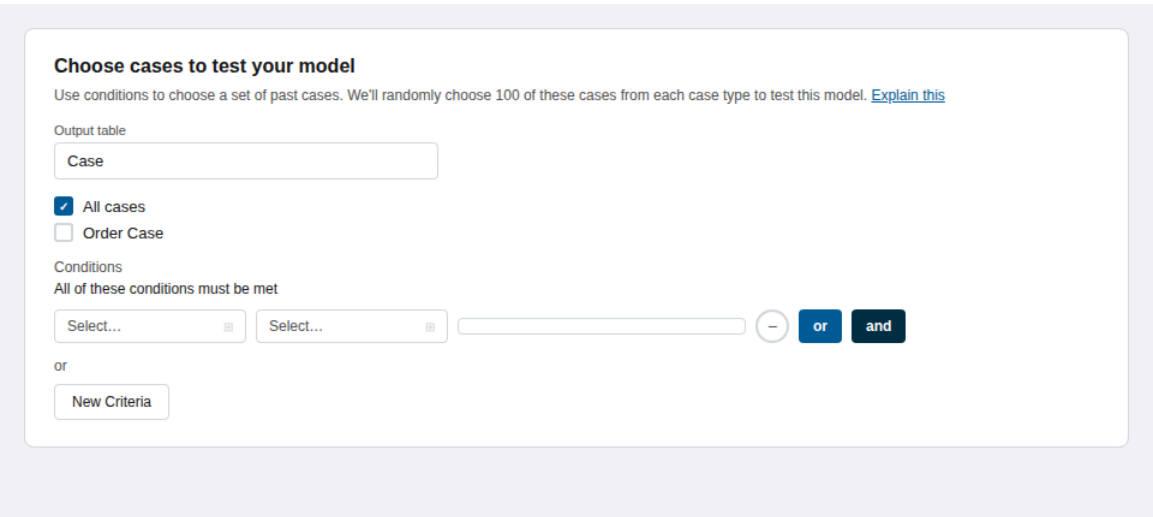
1. Select the table that contains the records to be tested.

   Select **All cases** to test records in the Case table or select a case type table.

2. Select **Save & continue**.

Test your model

Choose the cases to use to test the model.



Selecting this information tells the model what type of records to use for testing. When the model is deployed, it predicts sentiment on all records in the table that match the selected conditions.

1. Use conditions to choose a set of records for testing.
2. Select **Launch testing**.

Assess your model

Assess the results from the testing and view sample results for past cases.

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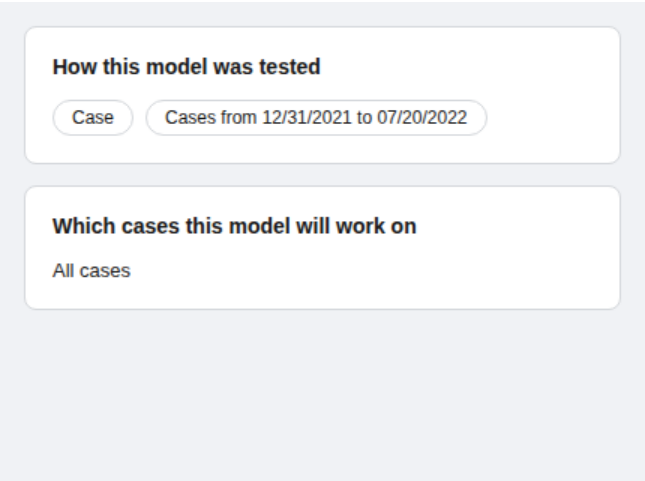
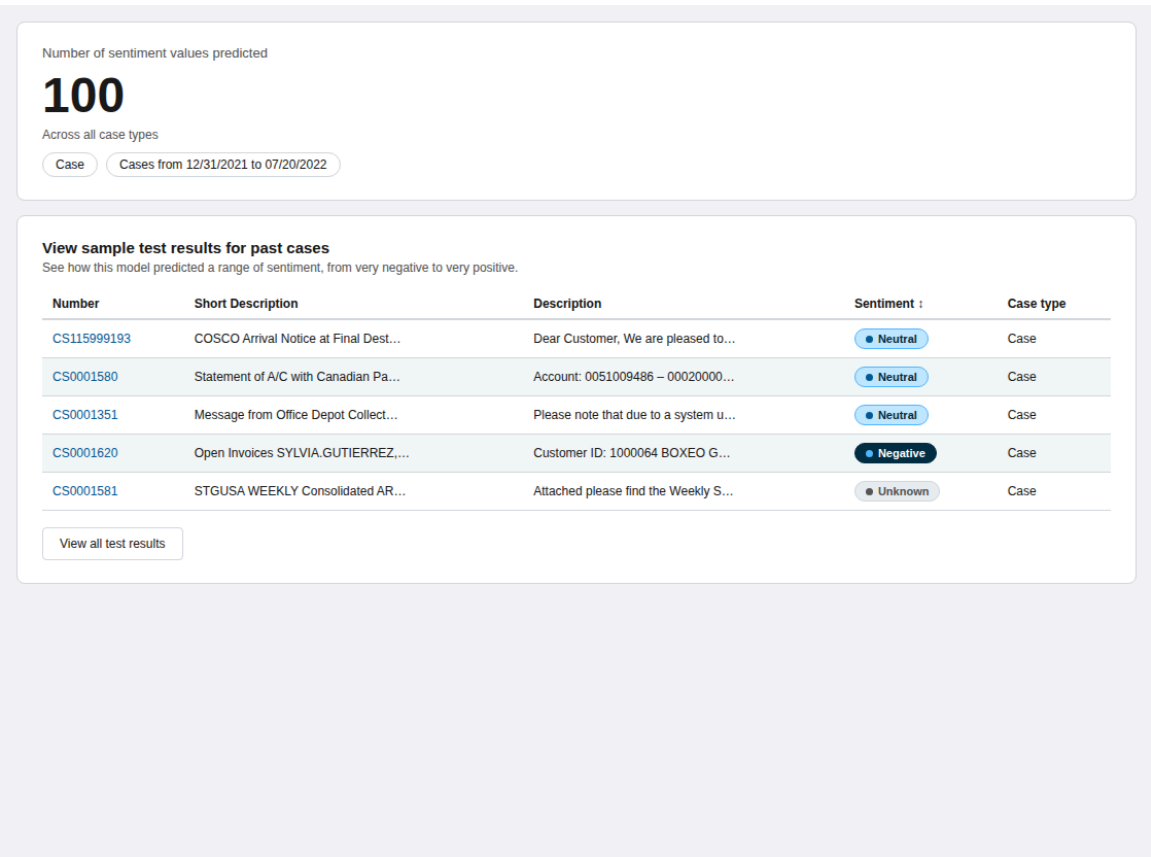


Reviewing the results gives you a preview of how your model will perform after being deployed.

1. Select **View all test results** to see a list of results.
2. Select **Save & continue**.

Set your preferences

Tell the model how you want to use the sentiment predictions.



1. Display predictions in the **Current sentiment** and **Sentiment over time** fields.
2. If desired, you can run the model in the background only.

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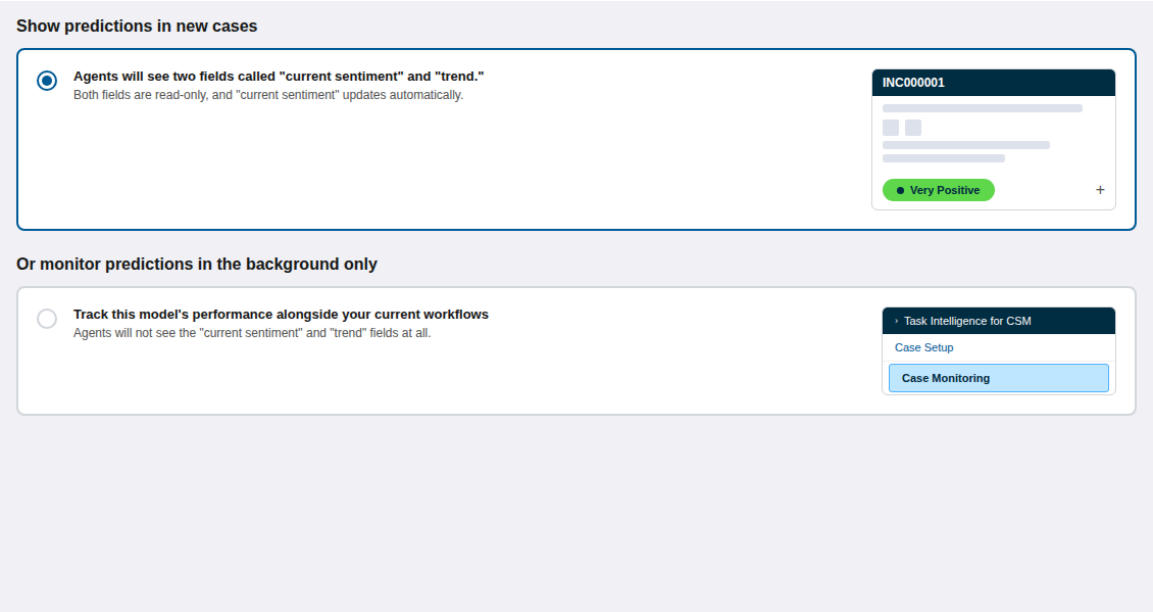
With this option, the system makes the predictions and stores the information in the Predictions History but does not add any information to the case records.

3. Select **Save & continue**.

Deploy your model

Review your choices from the previous pages. Then you can select **Deploy** to deploy the model.



Create a model to detect case language

Edit and test the pre-trained model to detect the language used to create customer service cases.

Before you begin

Role required: ti_admin

About this task

The language detection model is a pre-trained model. You select a set of records to test the model and then view the results before deploying.

Using the language detection model automatically enables the Task Intelligence Case Language Detection flow and the `sn_csm_ml_task.case.language.mlpredictor.enabled` property.

Prerequisite

- Activate the I18N: Internationalization plugin
- Enable the ServiceNow translator.

For more information, see Configure language detection.

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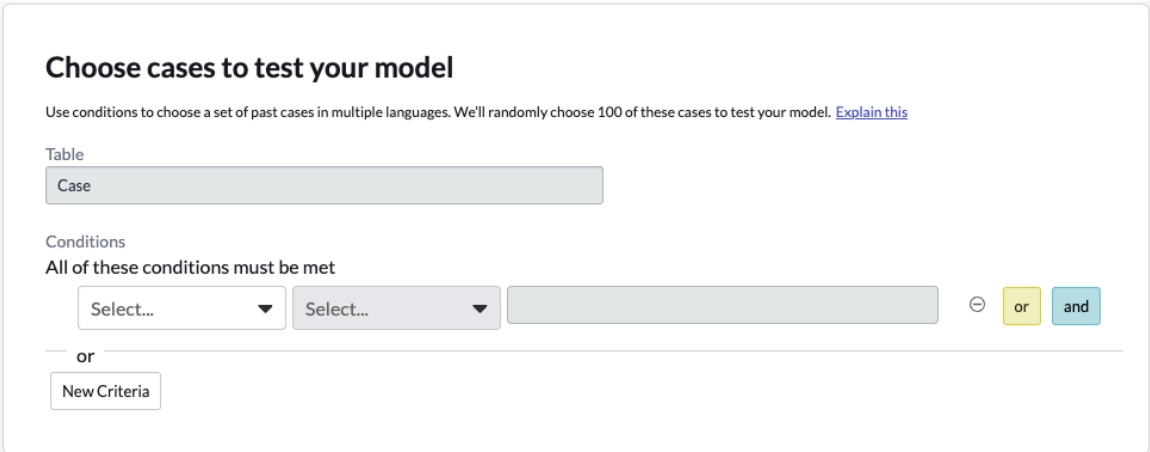
Set up your model

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. Select **Edit model** on this model: **Predict case language to improve assignments**.

   This opens the model and displays the first of four pages. Each page in the model asks you questions and helps you select the information you need to build an effective model.

Test your model

Choose the cases to use to test the model.



Selecting this information tells the model which records to use for testing. When the model is deployed, it predicts the language on all records in the table that match the selected conditions.

1. Use conditions to choose a set of records for testing.
2. Select **Launch testing**.

Assess your model

Assess the results from the testing and view sample results for past cases.

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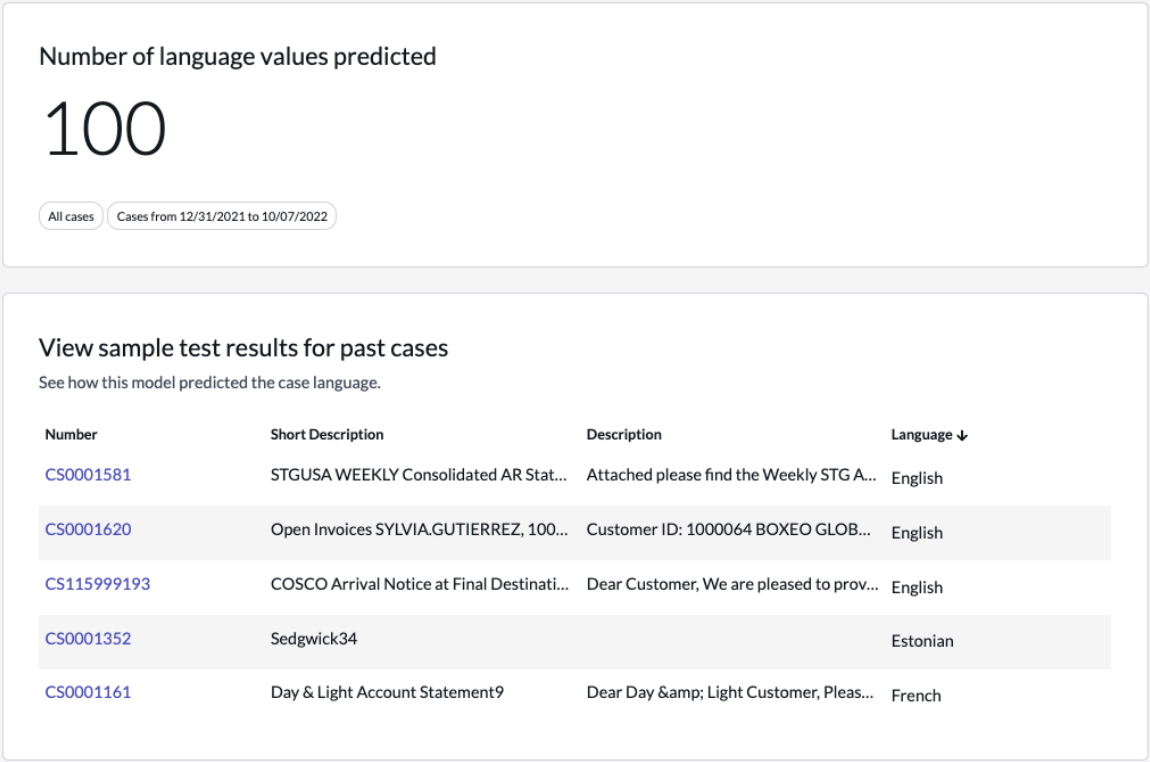

Reviewing the results gives you a preview of how your model will perform after being deployed.

1. Select **View all test results** to see a list of results.
2. Select **Save & continue**.

Set your preferences

Tell the model how you want to use the language predictions.

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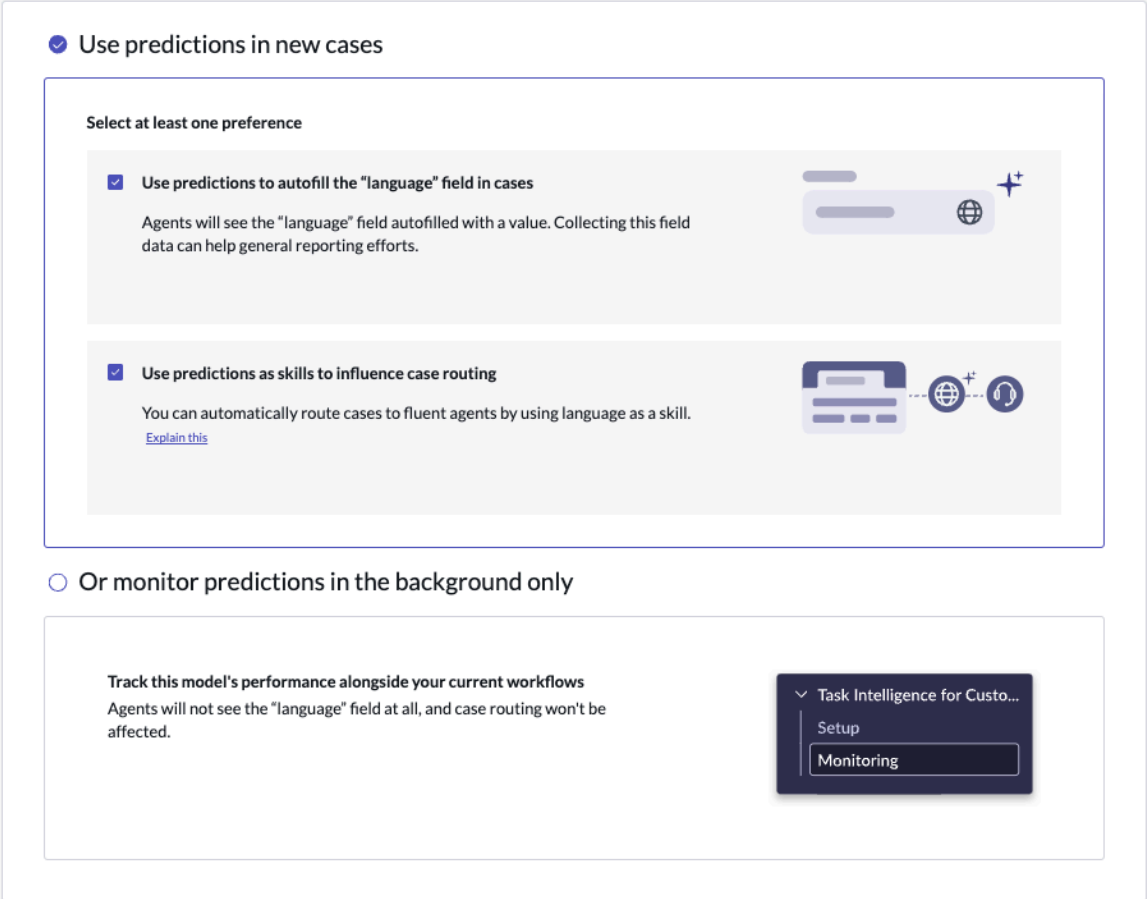

1. Use predictions in new cases.
   a. Add the predicted language in the **Language** field in cases.
   b. Use the language prediction as a skill to assist with case routing (add the language skill to the Task Skills table for the case record).
2. If desired, you can run the model in the background only.

   With this option, the system makes the language predictions and stores the information in the Predictions History but does not add any information to the case records.
3. Select **Save & continue**.

Deploy your model

Review your selections from the previous pages. Then you can select **Deploy** to deploy the model.

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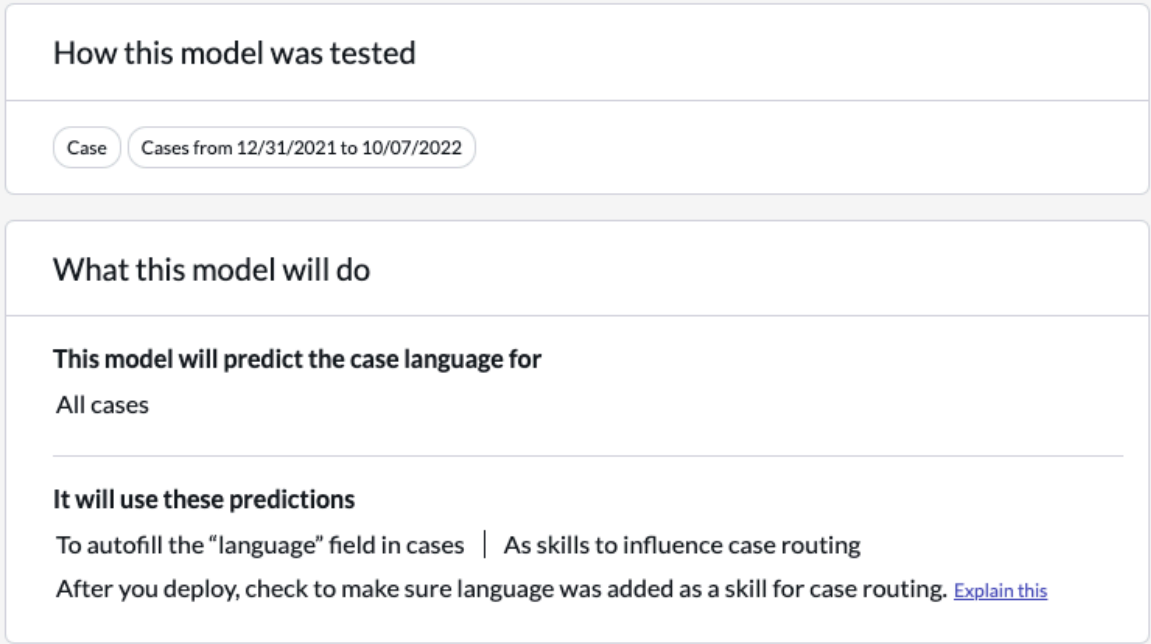

Create a Document Intelligence use case

Create a use case that identifies the information to extract from email and case attachments. Determine how users with CSM agent roles interact with the extracted values in the Document Intelligence workspace.

Before you begin

Role required: sn_csm_ml_task.ti_analyst, sn_csm_ml_task.ti_admin

About this task

A use case contains the list of fields to extract from attachments and a mapping of those fields to fields in the Case table or a case type table. It also contains an extraction mode that controls how the values for the extracted fields are added to the case.

Use cases include the following information.

Use case form fields and descriptions

Use case information	Description
Fields	Configure the list of fields to predict for a use case. A field is a single piece of information to extract from a document. For example, the date on a document.
Document tasks	Create a document task and include attachments that are used to train the Document Intelligence model to identify the correct information.
Integrations	Select conditions for a use case that tell the Document Intelligence feature when to run.

Prerequisite

- Activate Task Intelligence for Customer Service (com.snc.csm_ml_task).
- Activate Document Intelligence Admin (com.snc.docintel_admin).

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For more information, see Configure Document Intelligence for Customer Service.

Access the DocIntel Admin experience

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to open the Task Intelligence Admin Console.
2. In the Explore related applications section of the console, select **Open DocIntel** in the Document Intelligence card to open the DocIntel Admin experience.

Create a use case

Create a use case to identify a document or set of documents to be processed together in Document Intelligence. With Document Intelligence for Customer Service, the Use Cases list in the DocIntel Admin experience uses a default filter with an OR condition to show use cases for:

- Application = Task Intelligence for Customer service -or-
- MLUC ID = MLUC CSM-00003

To create a use case:

1. Select **Use Cases** in the DocIntel Admin header.
2. Select **New use case** in the Use Cases list.
3. In the Define a new use case pop-up window, enter the following information.

Define a use case pop-up window

Field	Definition
Name	The name of the use case.
Location for the extracted data	The table that contains the records to be automatically populated with data extracted from attachments. Set this field to the case or case type that is relevant to your use case.
Extraction mode set by default	The extraction mode determines how the results are displayed to agents in the Document Intelligence workspace. The DocIntel Admin starts by showing the results for each use case as recommendations.

4. Select **Save** to add the use case to the Use Cases list.

Define the fields to extract

After creating a use case, select the fields that you want to extract. You can select one or more fields for a use case. These fields can be of the text or Boolean type.

Note: The fields to be extracted should already exist in the use case target table. If the fields do not exist in the target table, add them to the table and then complete this step.

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1. Select a use case in the Use Cases list.
2. Select the Fields tab.

   This tab lists the fields that have been selected for extraction for the use case.

3. Select **Define your fields**.

   If you have already defined one or more fields and you want to add another field, select **New field**.

4. Fill in the fields in the Define a new field pop-up window.

Define field pop-up window

Field	Definition
Use case	[Read only] The use case associated with this field record.
Field Name	The display name of the field to extract as it appears in the Document Intelligence workspace.
Field Type	The type of field (for example, a text field or a check box option). Field type is read-only if you add this field to a field group. The field type is whatever is designated for the group. Some field types convert the extracted value into a standard format. See Data normalization.
Is field required	[Text and number fields only] Required fields can't be left empty or unreviewed.
Add field	Select the field group that you want to add the field to.
Target Table	[Read only] The table that stores the document processing results for this use case.
Target Field	Field on the target table you want to align this field with. Used for interation. **Note:** You must select a use case with a target table.
Define multiple fields	If you're adding more than one field to the use case, enable this check box to keep the pop-up window displayed on the screen.

5. Select **Add field**.

   The system adds the field definition to the Fields list.

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Create a document task

Document tasks include attached documents that are used to train the model to identify and extract the correct information.

1. Select a use case in the Use Cases list.
2. Select the Document tasks tab.

   This tab lists the tasks that have been created for the use case.

3. Select **Create a document task**.

   If you have already created one or more tasks and you want to add another task, select **New document task**.

4. In the Create the document task pop-up window, enter a **Document task name**.
5. Select **+Add File** to add one or more attachments.
6. Select the file and then select **Open**.
7. In the Upload a file pop-up window, select **Upload**.
8. In the Create the document task pop-up window, select **Add Extraction**.

   The system adds the task to the Document Tasks list and Document Intelligence begins the data extraction process, which can take a short time to complete.

   - When the extraction process is complete, the **Is Processed** field is set to true.
   - When the values have been extracted from the document, the **Status** field is set to Done.

9. Open the task and select **Open in Document Intelligence** to view the task in the Document Intelligent Workspace.
10. Train the extracted fields to identify the correct values.
    a. If a field value is correct: put your cursor in the field and press Return to confirm the value.
    b. If a field value is missing: select the value from the list and press Return to confirm the value.
    c. If a field value is incorrect: delete the incorrect value and type the first few characters of the correct value. When the correct value appears in the list, select it and then press Return.
    d. If a field value is incorrect and the correct value does not appear on the image, select *Missing in the document* from the list.
    e. Select **Submit**.

Create an integration

Select conditions for a use case that tell the Document Intelligence feature when to run.

You can create one or more integrations for a use case. If a use case has more than one Integration, the system uses the latest one at run time.

Note: When creating an integration, make sure that the **Create Flow** check box remains unchecked.

1. Select a use case in the Use Cases list.
2. Select the Integrations tab.

   This tab lists the integrations that have been created for the use case.

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3. Select **Set up your first integration**.

   If you have already created one or more integrations, select **Add integration**.

4. In the Create Integration pop-up window, enter a name for the integration.
5. Use the condition builder to select conditions that tell the Document Intelligence feature when to predict values.

   At run time, the system identifies the right task definition based on these filters. The first active task definition that matches the filters for the case or case type is selected.

6. Select **Save**.

Set general Document Intelligence features

General settings determine how the Document Intelligence feature displays information to agents. General settings apply to all use cases.

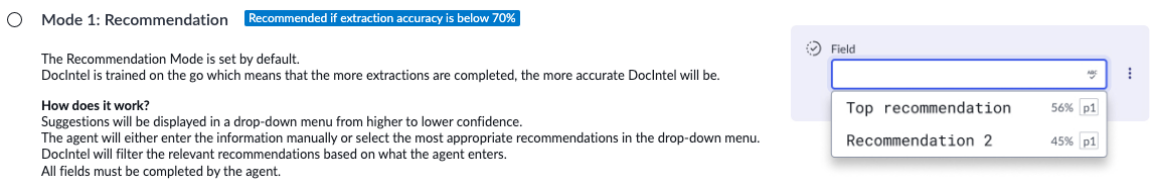
1. Select **Settings** in the DocIntel Admin header.
2. Enable or disable the **Exact match option**. When enabled, Document Intelligence displays only the candidate values that exactly match what the agent types.
3. Enable or disable the **Candidate score** to display confidence scores for each recommendation.
4. Select a layout for the **Side panels**.
5. Set the **Default width of the extraction panel**.
6. Set the **Default width of the thumbnail panel**.
7. Select the **Default document fit for the image panel**.

Configure the data extraction mode

The extraction mode determines how the Document Intelligence workspace handles the extracted values. Two extraction modes are available: Recommendation and Autofill.

- Recommendation mode provides recommendations for the extracted fields in the Document Intelligence workspace. Agents can choose the recommended value for a field or manually enter a value.
- Autofill mode adds values to the fields in the Document Intelligence workspace if the extraction confidence is higher than the **Autofill Threshold** value.

1. Select **Settings** in the DocIntel Admin header.
2. In the left column of the Settings page, expand the Use Cases list and select a use case.
3. Select **Extraction Mode**.
4. To use the Recommendation mode, enable **Mode 1: Recommendation**.



5. To use the Autofill mode, enable **Mode 2: Autofill**.

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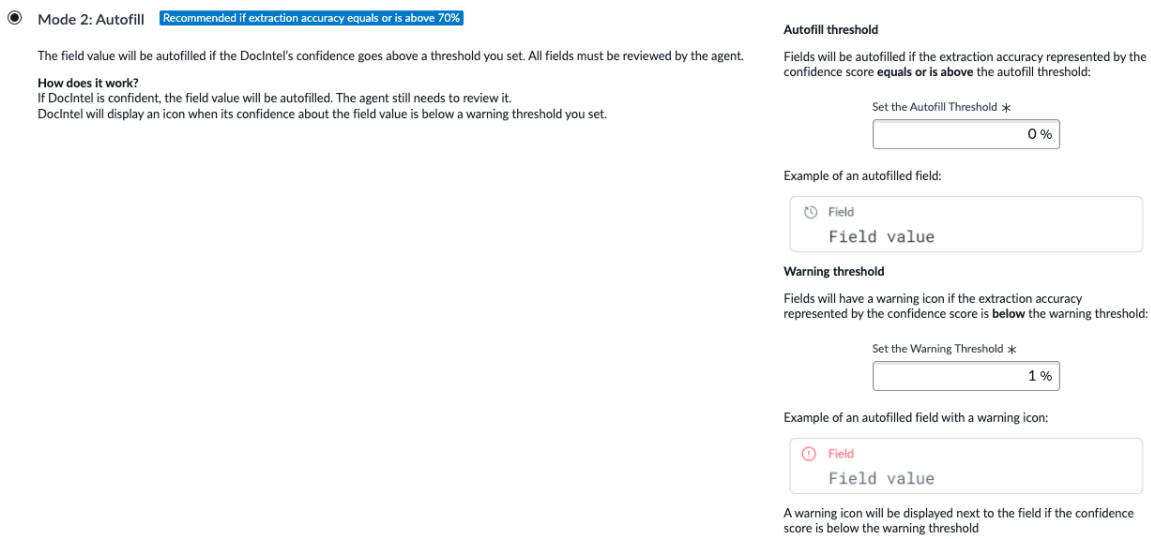
a. Enter a percentage value in the **Set the Autofill Threshold** field.

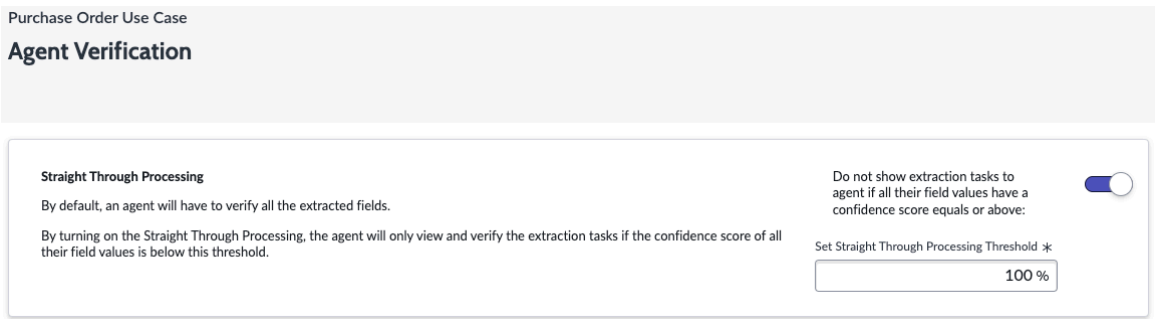
b. Enter a percentage value in the **Set the Warning Threshold** field.



Configure the agent verification setting

By default, agents review and verify the fields with values that are extracted from attached documents. You can enable Straight Through Processing to automatically populate these fields with extracted values. When enabled, agents only review and verify the extraction tasks if the confidence score of all field values is below the set threshold.

1. In the left column of the Settings page, expand the Use Cases list and select a use case.
2. Select **Agent Verification**.



3. If desired, enable **Straight Through Processing**.
4. Enter a percentage value in the **Set Straight Through Processing Threshold** field.

Create a model to predict similar open incidents

Use the Task Intelligence for CSM to create and train a machine learning model that identifies similar open incidents. The model analyzes similar open incidents data to suggest relevant incident records when working on a current open incident, helping agents resolve issues faster. The plugin includes a ready-to-train model for predicting similar cases and also lets you create custom models tailored to your specific use cases.

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Before you begin

- Ensure that the Task Intelligence for Customer Service plugin is installed.
- Ensure that your instance contains sufficient open incident records (minimum 10,000 recommended) for meaningful training.
- Role required: ml_admin, ti_admin

Set up the prediction model

Procedure

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup**.
   The Task Intelligence Admin Console displays.
2. On the Similar Open Incidents card, select **Ready to train**.
   The model opens in a guided setup flow. The Define the purpose screen appears.
3. **Define the purpose:**

   a. Review the pre-filled Model name.

   b. The Prediction table and Training table are pre-selected as **Cases** and **Incidents**, respectively.
   These values are fixed and cannot be edited.

   c. Select **Save & Continue**.
   The Train your model screen appears.

4. **Train your model:**

   a. The **Model name** and **Prediction table** fields are pre-filled and cannot be edited.

   b. **Optional:** Apply **Conditions** to filter the training data.

   c. In the **Prediction table** field, select fields such as Description and Short description that the model should use to identify similarities.

   d. In the **Training table** section, select matching or relevant fields that help the model compare open incidents.

   e. Choose the **language** for training.

   f. Set the **Update frequency**.

   g. Review the **Number of records**.
   If needed, select the **Load records** icon to reload.

   h. **Optional:** Enable **Auto-retrain** to allow retraining the model on a set schedule.

   i. Select **Launch training**.

   j. Once training starts, select **View current results** to preview sample outputs.
   The Assess and define screen appears.

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5. **Assess and define**:

   a. Review the **Estimated number of records** used for training.

   b. In **Prediction preference**, select one of the following options:
      - Recommendations – Recommends similar open incidents (selected by default).
      - Monitor only – Runs the model in the background without displaying recommendations. You can analyze the logged data before enabling recommendations.
      - Turn off predictions – Disables all predictions for this model.

   c. Select **Save & Continue**.
      The Deploy your model screen appears.

6. **Deploy your model**:

   a. Review your setup and training summary and then select **Deploy** to activate the model.
      A confirmation message appears when deployment is complete.

   Result

   Once deployed, similar open incidents are displayed in the Recommended Actions section under the Suggested Actions tab when an agent opens a case that helps them resolve cases faster using related issues and prior solutions.

Create a model to predict similar cases

Test and edit the pre-trained similar cases model for predicting similarity in customer service cases and create a model for custom cases.

Pre-requisites

Role required: ml_admin, ti_admin

About this task

Base system models: Task Intelligence for Customer Service includes three base system models for predicting similar records for cases:

- Major Case identifier
- Similar Open Cases
- Similar Resolved Cases

To get recommendations for a major case identifier that includes propose major cases and similar major cases, install the major issue management plugin.
Activate the feature as needed to get recommendations. When you install the Task Intelligence for CSM plugin in your production instance, the plugin automatically installs and trains three models using your data: similar open cases, similar resolved cases, and major case identifier. These models are then auto-deployed. The similar open case and similar resolved case models show predictions on recommended actions on case form. However, recommendations aren't enabled for the major case identifier model in the base system.

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Steps to activate Major Case identifier recommendation

1. Navigate to **All** > **Recommended Actions** > **Recommendations**.
2. Select **Propose major issue** under the Application scope **Task Intelligence for Customer Service**.
3. Check the **Active** check box.
4. Select **Update**.

   Repeat the steps for **Similar major cases**.

Note:

Propose major issue and similar major cases are inactive in the base system.

Enable Suggested Actions on the front line case page record

Before you begin

Role required: workspace_admin, ui_builder_admin, ti_admin, next_best_action_author

Recommended Actions component should be added to the specific record page. (Front line or CSM default record page)

About this task

To enable **Suggested Actions** tab, the admin should activate the **Recommended actions** feature on two specific pages: **Front line case page** and **CSM default record page**. Once activated, agents can view the recommendations on these pages.

Note: For CSM default record page, first wire Recommended actions on this CSM default record page first, and then enable the **Suggested Actions** tab in UIB via the component property.

To enable **Suggested Actions** feature in the Recommended Actions component, follow the following steps:

1. Navigate to **All**> **Now Experience Framework** >**Experiences**.
2. Select the UX application **CSM/FSM Configurable Workspace**.
3. Select **Open in UI Builder**.
4. Navigate to **Record** under **Pages and variants**.
5. Select **Front-line Case page**.

   Note: Verify that you are in the accurate scope to be able to edit.

6. Select **Recommended Actions 1** under the Tabs.
7. In the Configure tab, turn off the toggle for **Hide recommended actions**.
8. Select **Save**.

By following these steps, you successfully activate the Recommended Actions feature, enabling agents to view suggestions under Recommendations in the CSM/FSM Configurable Workspace.

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When you open a case, you find the recommendations section with two tabs: **Search** and **Suggested Actions**. The recommendations are displayed under **Suggested Actions**.

Enable Recommended actions in the CSM default record page

1. Navigate to **All**.
2. In the search box, enter sys_ux_screen_condition.list and press enter.
3. Select the filter icon, enter **[Screen] [contains] [Recommeded Actions default]** and **[Application] [is] [Recommeded Actions]**, and select **Run**.
4. Select the **true** link under **Active**.
5. On the **UX Screen Condition** page in the Script, replace the return value with **true**.
6. Select **Update**.

Result: On opening a case, the recommendations section with two tabs: Search and Suggested Actions is displayed. The recommendations are displayed under Suggested Actions.

Find out how to Create a custom similar case model, Edit a model, and Export a model

Create a model to predict similar knowledge articles

Use the Task Intelligence for CSM to create and train a machine learning model that recommends relevant knowledge articles based on the context of open incidents. The model analyzes existing data to display relevant articles when working on a current case, helping agents find useful information faster. The plugin includes a ready-to-train model for predicting similar articles and also enables you to create custom models tailored to your data.

Before you begin

- Ensure that the Task Intelligence for Customer Service plugin is installed.
- Ensure that your instance contains sufficient case and knowledge data (minimum 10,000 recommended) for meaningful training.
- Role required: ml_admin, ti_admin

Set up the prediction model

Procedure

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup**.
   The Task Intelligence Admin Console displays.
2. On the Similar Knowledge Articles card, select **Ready to train**.
   The model opens in a guided setup flow. The Define the purpose screen appears.
3. **Define the purpose:**

   a. The Prediction table and Training table are pre-selected as **Cases** and **Knowledge**, respectively.
   These values are fixed and can't be edited.

   b. Select **Save & Continue**.
   The Train your model screen appears.

4. **Train your model:**

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a. The **Model name** and **Prediction table** fields are pre-filled and can't be edited.

b. **Optional:** Apply **Conditions** to filter the training data.

c. In the **Prediction fields** field, select Short description that the model uses to identify similarities.

d. **Note:** The options selected here are defaults. You can modify the options in the **Prediction fields** and **Training fields** based on your requirements.

   In the **Training fields** field, select Article body and Short description of the Knowledge training table.

e. Choose the **language** for training.

f. Set the **Update frequency**.

g. Review the **Number of records**.
   If needed, select the **Load records** icon to reload.

h. **Optional:** Enable **Auto-retrain** to enable retraining the model on a set schedule.

i. Select **Launch training**.

j. Once training starts, select **View current results** to preview sample outputs.
   The Assess and define screen appears.

5. **Assess and define**:

   a. Review the **Estimated number of records** used for training.

   b. In **Similar Knowledge preference**, select one of the following options:
      - Recommendations – Recommends similar records based on training and prediction fields (selected by default).
      - Monitor only – Runs the model in the background without displaying recommendations. You can analyze the logged data before enabling recommendations.
      - Turn off predictions – Disables all predictions for this model.

   c. Select **Save & Continue**.
      The Deploy your model screen appears.

6. **Deploy your model**:

   a. Review your setup and training summary and then select **Deploy** to activate the model.
      A confirmation message appears when deployment is complete.

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Result

Once deployed, similar knowledge articles appear in the Recommended Actions section under the Suggested Actions tab when an agent opens a case, helping them resolve cases faster.

Edit a model

Edit the case models that have already been trained and deployed. Change the model configurations, view the updated training results, and redeploy the model.

Before you begin

Role required: ti_admin

A prediction model must already be created, trained, and deployed.

About this task

You have two options for editing your model: view the current training results or retrain the model. The first time you edit a model, a pop-up appears to ask you which option you would like to take. Resetting your prediction preferences enables you to change how visible the predictions are for agents. Retraining your model enables you to select new data for training, which changes the prediction capabilities of the model. While you can retest your prediction model, it doesn't change the prediction skills.

Procedure

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup**.
2. From the **Models** list, select the menu icon of the model you want to edit, and then select **Edit Model**.
3. Modify the fields to get the required predictions.
4. Select **Launch training**.
   A warning message appears asking if you want to update and train the model.
5. Select **Retrain**.
   The new training results page loads.
6. Select the **Compare models results** button to show both the previous results and the new results.
7. Select **Save & continue**.
8. Set your preferences for displaying the predictions or running them in the background.
9. Select **Save & continue**.
   The **Deploy your model** screen loads and shows the changes that you made indicated in yellow. If you don't want to deploy the changes, select **Discard changes**.
10. Review the model and select **Redeploy**.
    Your updated model is deployed.

What to do next

See how to Export a model

Export a model

Export a Task Intelligence model to another instance.

Before you begin

Role required: ti_admin or tia_admin

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Procedure

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup**, depending on which application and context you want to export for.
2. In the **Models** list, select the more options menu of the model you want to export.
3. Select **Export model**.
   A new tab opens with authentication steps.
4. Select **Allow**.
   Your browser screen goes blank. To check that the download was successful, look at the bottom left of your browser and also check your download location to see if you have the exported model on your computer. Repeat this process for any other Task Intelligence models that you want to move to the target instance.

Result

The browser downloads the XML file to your system.

What to do next

You can use the XML file to transfer the model to another instance using update sets. To learn more, see System update sets. Find out How to move your trained Task Intelligence Models to a different instance.

Create a custom similar case model

Set up a training model to help it recognize similarities between two types of tables by comparing their fields.

The model looks at the prediction fields of a prediction table and the training fields of a training table. It uses the similarities in these fields to predict similar records.

Before you begin

Role required: ml_admin, ti_admin

About this task

The case similarity model is pre-trained with a large data set to learn communication patterns. You select a set of records to test the model and then view the results before deploying.

Set up similar cases prediction model

Use Task Intelligence for CSM to set up similar case prediction model and train it with your data to make predictions. Access your model's performance results, set the prediction preferences and behavior, and deploy your model.

1. Navigate to **All** > **Task Intelligence for Customer Service** > **Setup** to access the Task Intelligence Admin Console.
2. On the **Suggest similar case to reduce resolution time** card, select **Set up model**.

This action opens the model and displays the introductory pages. Each page in the model asks you questions and helps you select the information needed to build an effective model.

Train the similarity model

Train your similar case model with training data to predict the similar records by recognizing similarities between fields of Case table and training tables. When you train a machine learning model, the model looks at the prediction fields of a prediction table and the training fields of a training table. It uses the similarities in these fields to predict similar records.

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You can select the table and fields that you want to predict, such as the Prediction table and Predictions fields. Also, you can select the tables and fields that you want the model to use to predict the similar records, such as the Training table and Training fields. Select this information to tell the model what to look for during training.

Note: You can either use the recommended settings or customize the settings to fit your needs.

1. Enter a name for the model.
2. Select the **Prediction table** you want the model to predict.
3. Select **Conditions** to choose a set of records to use for training.

   Note: These conditions provide the requirements that a record must meet to make the predictions. However, this functionality is currently not supported.

4. Select the **Prediction fields** which will be used to predict similar records.
5. Select the **Training table** in the training data that you want the model to use to make predictions.
6. Select **Conditions** to choose a set of records to use for training.
7. Select the **Training fields** that you want the model to use to make predictions.
8. Select the **Language** in which training takes place.
9. Select the **Update Frequency** to decide how frequently the training should occur.
10. Review the resulting **Number of records** in the training data based on the selected conditions.

    The records that are counted include the number of fields, parameters, and data that the model uses to train. Based on the provided information and the set conditions, the number or records gets updated automatically. The model needs a minimum of 10,000 records for effective training. If this minimum number hasn't been reached, try selecting different conditions. You can also click the refresh icon to refresh the number.

11. Select to retain a model manually or set it to auto retrain.
12. Select **Launch training**.

Assess the similarity model

Assess the results from the model training and view sample results to see the similar records predicted for cases. Reviewing the results gives you a preview of how your model will perform after being deployed. Based on the sample results, select the prediction preference. The model has flexible options. Based on the sensitivity and requirements of each case record, you can do the following actions:

- Recommend similar records for the cases.
- Monitor and run the prediction model for the cases in the background only. Admin can track the predictions made by model by going to **All** > **Task Intelligence for Customer Service** > **History**.
- Turn off the predictions for the cases.

Steps in Assess the similarity model:

1. View the number value in the **Estimated number of records used for training** section.
2. Select **View sample results** to see the similar records predicted for each case.

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3. Choose one of the following options from the **Prediction preference** drop-down list for each field.

Options	Description
Recommendations	Shows the top recommendations based on the similarity patterns. Agents can choose to accept or reject the recommendation. You can configure the number of recommended values using Advanced Recommended actions for CSM. For more information, see Configuring the Recommended Actions application.
Turn off predictions	Stops the model from performing any predictions.
Monitor only	Monitors and runs the model in the background only without making any predictions on the case form.

4. Select **Save & continue**.

Deploy the similarity model

Deploy the Similar cases model to predict the similar records for the cases.

1. Review your choices from the previous pages and information about how the model was trained.
2. Select **Deploy** to deploy the model.

A pop-up appears confirming that your model was deployed.

Predictive Intelligence for CSM solution definitions

Use your instance records to build Customer Service Management specific solutions.

Solution definitions

These solution definitions are available as templates on instances where both Predictive Intelligence and Customer Service Management are active. Create your own solution definition records to customize the behavior.

Solution Definitions for Customer Service Management

Solution Definition	Solution Type	Description
CSM Case Assignment	Classification	Predicts the **Assignment group** field from the **Short description**.
CSM Case Categorization	Classification	Predicts the **Category** field from the **Short description**.
CSM Case Prioritization	Classification	Predicts the **Priority** field from the **Short description**.

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Solution Definitions for Customer Service Management (continued)

Solution Definition	Solution Type	Description
Grouping of Cases into Topics	Clustering	Clusters similar cases into topics based on the **Short description**.
All Similar Cases	Similarity	Recommends similar cases based on the **Short description** that can help customer service agents with case investigation and resolution processes.
Recommended Open Cases	Similarity	Recommends similar open cases based on the **Short description**.
Recommended Resolved Cases	Similarity	Recommends similar resolved cases based on the **Short description**.
Major Issue Detector	Similarity	Provides recommendations for major issues based on the **Short description**. • Recommends one or more major cases, if available. • Otherwise, recommends similar cases that are not linked as child cases to a major case.
Similar Knowledge Articles	Similarity	Recommends similar knowledge articles by comparing the **Text**, **Short description**, and **Description** fields of knowledge articles to the **Short description** of the customer service case.
Similar Knowledge Articles All	Similarity	Recommends similar knowledge articles by comparing fields in the Knowledge View database view [sn_customerservice_knowledge_view] with the **Short description** of the customer service case.

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Solution Definitions for Customer Service Management (continued)

Solution Definition	Solution Type	Description
		Note: This solution definition is used in the Auto-Responder feature. For more information, see Train the similarity solution for finding Auto-Responder notification content.

Business rules for classification solutions

These business rules apply only to the CSM Case Assignment, CSM Case Categorization, and CSM Case Prioritization solution definitions. The rules are available only on instances where both Predictive Intelligence and Customer Service Management are active. Create your own business rules on the Case [sn_customerservice_case] table to customize prediction and reporting behaviors.

Business rules for Customer Service Management

Business rule	Table	Description
Default Case Based Prediction	Case [sn_customerservice_case]	Generates prediction results from the active Customer Service Management solutions. Runs when a case record is inserted.
Update Prediction Results	Case [sn_customerservice_case]	Updates the solution precision and coverage statistics. Runs when a case record is closed.

Upgrade Information

If your instance is running on the Kingston release and you are upgrading to the Brazil release:

- Use the Default Case Based Prediction business rule template to create a new business rule. This rule includes a Solution variable that gets all active solutions retrieved by the findActiveSolution(solutionName) method.
- In a global domain environment, use the solutionNames array variable which requires that you explicitly provide the solutions that are called by the business rule.
- In a domain-separated environment, such as an MSP environment, refer to the commented code in the business rule template for easy customization.
- The business rule template calls the applyPredictionForSolution() method to predict regardless of any changes to the default value.

Maintaining prediction accuracy

You can manage prediction drift by retraining, modifying, or creating solutions to reflect changes in your business conditions. Test and modify your business rule over time to verify it works as desired across multiple consumption points and user personas.

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Related topics

Similar case/recommendation

Trending case topics

Resolve cases more efficiently and proactively using Predictive Intelligence to identify clusters of cases with similar issues and pinpoint factors that drive up case volume. Each cluster of cases represents a trending case topic.

Using trending case topics has the following benefits:

- Increase manager productivity: Quickly identify clusters of cases that point to similar underlying issues and act to resolve them.
- Improve customer experience: Proactively resolve issues by analyzing patterns in customer service data.
- Enhance operational excellence: Reduce the backlog of open cases by resolving similar cases at once.

System administrators train solution definitions to cluster similar cases and identify similar major cases for the clustering.

Major issue managers use trending case topic lists to analyze the backlog of cases. Using the lists, they can quickly identify any existing major cases that the backlog could be linked to or create a new major case.

Activation information

The trending case topics feature requires the Predictive Intelligence for CSM (com.snc.csm_ml) plugin and the Major Issue Management (com.sn_majorissue_mgt) plugin.

Related topics

Configure trending case topics

View trending case topics

Add trending case topics to existing major cases

Create major cases for trending case topics

Configure trending case topics

Train solution definitions to identify clusters of cases that point to similar underlying issues and find any related major cases for the clusters.

Before you begin

Role required: admin

About this task

Access the menus and use the modules to train the solution definitions to identify trending case topics. For more details, see Trending case topics.

Procedure

1. Navigate to **Predictive Intelligence** and then either **All** > **Similarity** > **Solution Definitions** or **Clustering** > **Solution Definitions**.
2. Complete the following tasks to train the solution definitions for trending case topics.

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Solution definitions field description

Task	Description
Train the clustering solution definition to automatically group similar cases into topics	Configure a clustering solution definition to cluster similar cases into groups.
Train the similarity solution definition to find similar existing major cases	Configure a similarity solution definition to find similar major cases for the clusters.

Train the clustering solution definition to automatically group similar cases into topics

To enable clustering of similar cases into topics, you must first update and train the clustering solution definition.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml).

About this task

By default, a clustering solution definition for clustering groups of cases into topics is already available. A clustering solution definition groups similar records into clusters so you can address them collectively or identify patterns.

You can modify the fields, filters, update frequency, and training frequency.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Clustering** > **Solution Definitions**.
2. In the Clustering Definitions list, search for and select the Grouping of Cases into Topics solution definition (ml_sn_sn_csm_ml_global_grouping_of_cases_into_topics).
3. On the Clustering Definition form, verify the default field values.
4. Change the fields and filters, as required.
5. To change the frequency with which the model for clustering solution definition must be rebuilt, edit the **Update Frequency** field.
6. To change the frequency with which to include new records in the model for the clustering solution definition, edit the **Training Frequency** field.
7. In the Training Request Schedule related list, view the schedule for training the Grouping of Cases into Topics solution definition.
8. Click **Update & Retrain**.
9. Open the Grouping of Cases into Topics solution definition.
10. In the ML Solutions related list, view the training solution progress in the **Progress** column.

    Note: Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

11. Click the **Cluster Visualization** tab.
    The clusters that were formed for the given solution are displayed in a tree map in descending order of size from top left to bottom right. Each node is colored from red to green depending on the cluster quality.

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Train the similarity solution definition to find similar existing major cases

To enable finding related major cases in a cluster, you must first update and train the similarity solution definition.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml).

About this task

By default, a similarity solution definition for finding similar existing major cases in a cluster is already available. A similarity solution definition collects and compares your existing records to new similar records.

You can modify the fields, filters, update frequency, and training frequency.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Major Issue Detector solution definition (ml_sn_global_major_issue_detector).
3. On the Similarity Definition form, verify the default field values.
   For more information about the Similarity Definition form fields, see Create and train a similarity solution.
4. Change the fields and filters, as required.
5. To change the frequency with which the model for similarity solution definition must be rebuilt, edit the **Update Frequency** field.
6. To change the frequency with which to include new records in the model for the similarity solution definition, edit the **Training Frequency** field.
7. In the Training Request Schedule related list, view the schedule for training the Major Issue Detector solution definition.
8. Click **Update & Retrain**.
9. Open the Major Issue Detector solution definition.
10. In the ML Solutions related list, view the training solution progress in the **Progress** column.

    Note: Alternatively, you can click the link for the solution in the **Active** column. On the ML Solution form, click the **Show training progress** related link to check the training solution progress.

Similar case recommendations

The similar case recommendation feature enables customer service agents to easily find similar cases that can provide helpful information about a current case. This feature can also provide recommendations about cases that may be related to major issues.

The similar case recommendation feature uses the following components:

Additional search resources for contextual search

Additional search resources are provided for contextual search. These additional resources enable customer service agents to search open or resolved cases for information related to the current case.

Predictive Intelligence similarity solution definitions

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Several of the additional search resources have an associated Machine Learning (ML) similarity solution definition. These additional resources perform a contextual search based on the case short description and return a list of similar records.

Predictive Intelligence in Agent Workspace

Predictive Intelligence can provide agents with a list of cases that are similar to the current case. These similar cases may provide helpful details or resolution information for the current case. Predictive Intelligence can also provide recommendations about potential major issues and major cases.

With the similar case/recommendation feature, customer service agents can:

- Find cases that are similar to the current case.
- Copy resolution notes and codes from resolved cases to the current case.
- Link the current case to a similar case.
- View a list of open cases similar to the current case and submit the current case as a major case candidate.
- View one or more similar major cases and link the current case as a child to a major case.

Major issue managers can search for cases that are similar to a major case and add them as child cases.

Using the feature in Agent Workspace and in the platform interface

With Agent Workspace, agents can:

- Perform a search in Predictive Intelligence using the additional search resources.
- Create a link from the current case to a selected case in the search results.
- Copy resolution information from a selected case to the current case. This includes the resolution code and the resolution notes (the agent must then save the case).
- View a list of similar cases that do not include major cases. This is a way to see that the current case might be a major case candidate.
- View a list of similar cases that include one or more major cases. The major cases are displayed first in the list of results. Agents can use an available action to add the current case as a child of a major case.

With the platform interface, agents can:

- Perform a search in the Related Search Results section on the Case form using the additional search resources. Agents can select these additional resources from a list by the **Related Search** field.
- Create a link from the current case to a selected case in the search results.

Plugins

The configuration for the similar case/recommendation feature is included with the Customer Service plugin (com.sn_customerservice).

The similar case/recommendation feature has a dependency on the Contextual Search plugin (com.snc.contextual_search). Activate the Contextual Search plugin to use contextual search and the additional search resources.

To use similar case/recommendation with the following features, activate the associated plugins:

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- Major Issue Management – activate the Major Issue Management plugin (com.sn_majorissue_mgt)
- Predictive Intelligence – activate the Predictive Intelligence plugin (com.glide.platform_ml)
- Problem Management – activate the Problem Management Best Practice – Madrid – State Model (com.snc.best_practice.problem.madrid.state_model)

Related topics

Machine learning solutions for Customer Service Management

Additional search resources

The similar case recommendation feature uses additional search resources, which are configured using the Contextual Search application.

Navigate to **Contextual Search** > **Additional Resources** to view the Search Resources (Additional Resources view) list. Two types of additional search resources are available: Table and Predictive Intelligence Similarity.

Table resources

Additional search resources of the type **Table** are based on a selected table and have specific conditions that must be met for a record to be included in the search results.

The following **Table** additional search resources are included with the Customer Service plugin:

- Resolved Cases
- Open Major Issues

The following **Table** additional search resources are included with the Problem Management Best Practice - Madrid - State Model plugin:

- Open Problems
- Resolved Problems

Table type additional search resources

Additional Resource	Table	Description
Resolved Cases	Case	Returns a list of cases created in the last six months that have a state of resolved or closed and the resolution code is one of the following: • Solved - Fixed by support/Guidance provided • Fixed by closing related PRB • Workaround provided based on open PRB Actions available: • **Link to Case**: the current case becomes a child of the case selected from the search results. • **Copy Resolution Information**: copies the resolution notes and resolution code from the selected case to the current case.

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Table type additional search resources (continued)

Additional Resource	Table	Description
Open Major Issues	Case	Returns a list of open major cases. Actions available: **Link to Case**: the current case becomes a child of the case selected from the search results.
Open Problems	Problem	Returns a list of open problems. Actions available: **Link to Case**: adds the selected record as the Problem reference on the current case.
Resolved Problems	Problem	Returns a list of problems that have a state of Resolved or Closed. Actions available: **Link to Case**: adds the selected record as the Problem reference on the current case.

Predictive Intelligence Similarity resources

Additional search resources of the type Predictive Intelligence Similarity are associated with a Machine Learning (ML) similarity solution definition. Search resources of this type require the Predictive Intelligence plugin (com.glide.platform_ml). The resources listed in the following table are included with the Predictive Intelligence plugin.

In addition to the associated similarity solution definition, Predictive Intelligence Similarity resources can have configured properties. These properties identify conditions that must be met for cases to be included in the search results.

Predictive Intelligence Similarity type additional search resources

Additional Resource	Table	Description
Recommended Resolved Cases	Case	Returns a list of resolved similar cases created in the last six months. Associated with the Recommended Resolved Cases similarity solution definition.
Recommended Open Cases	Case	Returns a list of open similar cases created in the last six months.

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Predictive Intelligence Similarity type additional search resources (continued)

Additional Resource	Table	Description
		Associated with the Recommended Open Cases similarity solution definition.
All Similar Cases	Case	Returns a list of all similar cases created in the last six months. Associated with the All Similar Cases similarity solution definition.

Major case agent assist recommendations

The Major Case agent assist recommendations is used for recommending major cases.

The agent assist provides a recommendation for each of the two major case scenarios:

- Major case found: returns a list with one or more major cases created in the time-frame indicated in the solution definition that are similar to the current case. Cases are listed by similarity score. The default time-frame is set to the start of yesterday.
- No major case found: returns a recommendation based on the number of cases created in the time-frame indicated in the solution definition that is similar to the current case (does not include any major cases). The default time-frame is set to the start of yesterday.

To configure the time-frame for the solution definition threshold, see Update your similarity score threshold.

If the Major Case agent assist recommendations find one or more major cases similar to the current case, the Predictive Intelligence tab displays these cases ranked by similarity score. The case with the highest score is highlighted with a white box and the title **Major Case** and includes a user action to link the current case to the major case.

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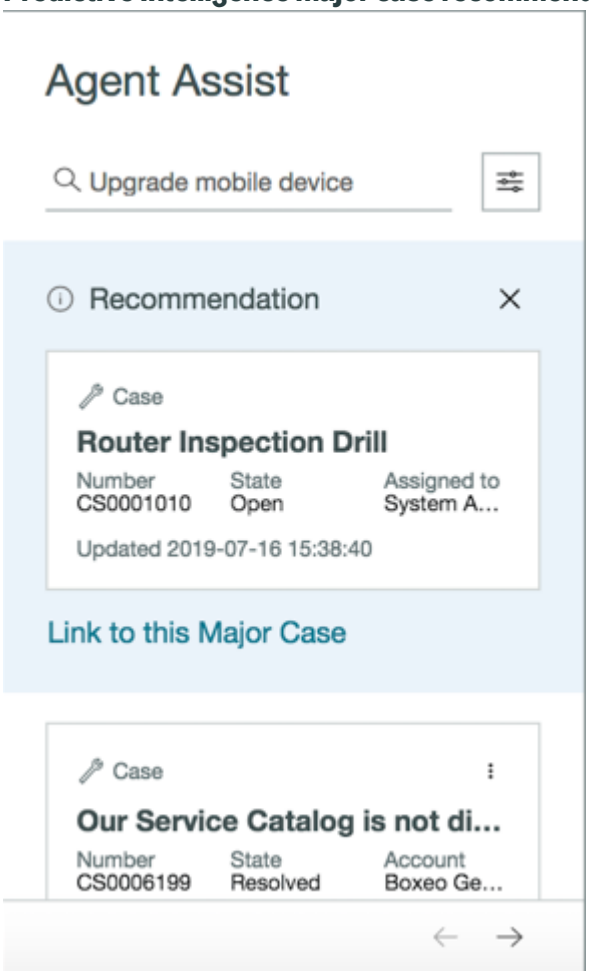
Predictive Intelligence major case recommendation



If the Major Case agent assist recommendations find cases similar to the current case, but no major cases, the Predictive Intelligence tab displays a recommendation highlighted with a blue box. It includes the option to propose the current case as a major case candidate.

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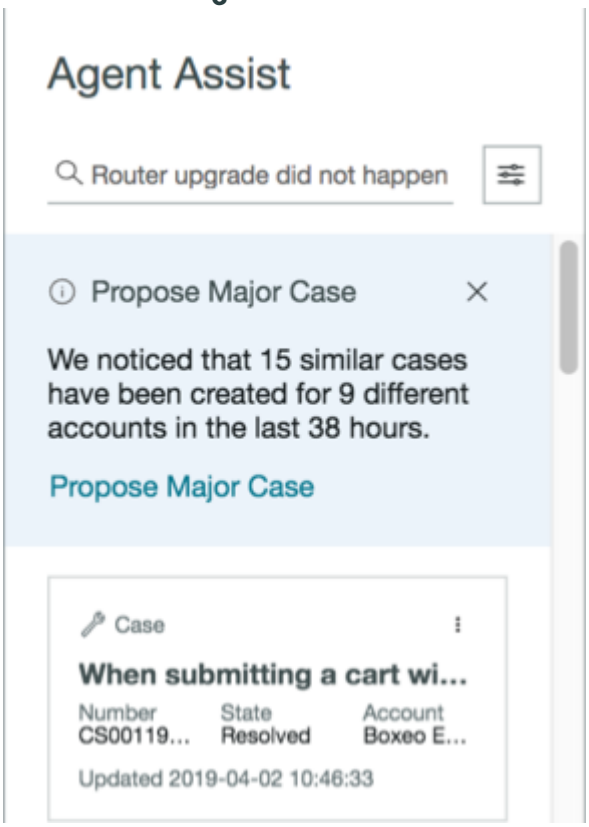
Predictive Intelligence tab similar case recommendation



The Major Case agent assist recommendations:

- Uses the Major Case agent assist recommendations ML solution definition.
- Includes some properties that provide customers with customization options, such as the recommendation title and message that appears in the Predictive Intelligence tab.
- Includes the **Potential Major Case** trend definition.

  This definition sets the threshold for:

  - Finding the number of distinct accounts that cases must belong to for a major issue recommendation. The default value is 3.
  - The number of similar cases that must be returned by the solution definition for a major issue recommendation using a script. The default value is 10.

Similarity solution definitions

The similar case recommendation feature uses several Predictive Intelligence solution definitions for similarity models.

Navigate to **Predictive Intelligence** > **Similarity** > **Solution Definitions**. The following solution definitions are provided with the similar case/recommendation feature.

- All Similar Cases (ml_sn_global_all_similar_cases)
- Recommended Resolved Cases (ml_sn_global_recommended_resolved_cases)
- Recommended Open Cases (ml_sn_global_recommended_open_cases)
- Major Issue Detector (ml_sn_global_major_issue_detector)

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Several of the additional contextual search resources used by the similar case/recommendation feature are associated with these solution definitions. Agents can select these search resources and access the cases returned by these similarity solution definitions.

Related topics

Create and train a similarity solution

Similar case user actions

Customer service agents and major issue managers can use the similar case recommendation feature to link cases, copy resolution information, propose major case candidates, and add cases to existing major cases.

User actions and results

User Action	Description	UI Action	Result
Customer service agent can link the current case to a similar case	• **Agent Workspace**: The Predictive Intelligence tab shows a list of similar cases ordered by the similarity score. • **Platform**: The Related Search Results section of the case form shows a list of similar cases ordered by the similarity score.	• Agent Workspace: Select the More UI actions menu and select **Link to Case**. • Platform: Select the desired case in the search results list, then select **Link to Case**.	The current case is linked as a child of the similar case.
Customer service agent can copy resolution information from a resolved case to the current case	**Agent Workspace**: The Predictive Intelligence tab shows a list of resolved similar cases ordered by the similarity score.	Agent Workspace: Select the More UI Actions menu and select **Copy Resolution**.	Copies the resolution code and resolution notes from the similar case to the current case. **Note:** Be sure to save the current case record.
Customer service agent can propose a major case candidate	**Agent Workspace**: The Predictive Intelligence tab shows a major issue recommendation	Agent Workspace: Select the **Propose Major Case** link.	The current case is proposed as a major issue.

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User actions and results (continued)

User Action	Description	UI Action	Result
Note: The Major Issue Detector similarity solution definition must be active.	with the following message: "We noticed that (x) similar cases have been created for (y) different accounts in the last (z) hours. Propose this as a major issue?"		
Major issue manager can associate the current case to a major case **Note:** The Major Issue Detector similarity solution definition must be active.	**Agent Workspace**: the Predictive Intelligence tab lists one or more major cases similar to the current case, ranked by similarity score.	Agent Workspace: Select the More UI Actions menu and select **Link to this major issue**.	The current case is added as a child to the major case.

Related topics

Similarity solutions

Estimated time to resolve a case

Machine learning in Customer Service Management helps with case resolution by predicting the estimated time to resolve a case.

Machine learning predicts the estimated time to resolve a case (ETTR) based on attributes of a case such as its short description, category, priority, and assignment group. For more information about configuring the machine learning regression definition for ETTR, see Configure the default estimated resolution time.

Activation

This feature is available with activation of the Predictive Intelligence for Customer Service Management plugin (com.sn_csm_ml). For more information, see Install Predictive Intelligence.

Agents must activate the **Time to resolve** ribbon component, which displays the ETTR, to view it in the CSM Agent Workspace or in the CSM Configurable Workspace. For more information, see Display the time to resolve ribbon component and CRM Workspace form ribbon and components.

Configure settings for estimated time to resolve values

After upgrading, configure some settings to view the **Time to Resolve Numeric Value** column in the case report for older cases and determine the information that is displayed.

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Before you begin

You must have a trained default estimated time to resolve a case regression solution. For more information, see Configure the default estimated resolution time.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Fix Script**.
2. Select the **Populate Numeric TTR values** fix script.
3. **Optional:** Modify the default parameter values.
   - *`LookBackPeriodInMonths`*: The number of past months of cases to examine. The default value is 15 months.
   - *`report.setLimit`*: The maximum number of records to examine. The default value is 150,000.
4. Click **Run Fix Script** to populate the estimated time values taken to resolve older cases.
5. Either run the script on screen or run it in the background.
   - To display the script running on the screen, click **Proceed**.
   - To run the script in the background, click **Proceed in Background**.

Configure the default estimated resolution time

The Estimated Time to Resolve a Case regression definition is available by default. You can modify the default values of case fields, the case timeline, and the training frequency.

Before you begin

Role required: admin, ml_admin

About this task

Note: Support for creating new regression solutions was deprecated in the Washington DC release. You can train and edit any existing solutions, but you can't initiate new ones. The following information is provided for legacy context. For more information see Create and train a regression solution.

The Estimated Time to Resolve a Case definition is available by default. You can train this available definition to complete a solution and make predictions. You can change some of the default settings such as the fields, a filter, and the training frequency. For more information on creating and training a solution, see the following.
Create and train a regression solution.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Regression** > **Solution Definitions**.
2. Click **Estimated Time to Resolve a Case**.
   In the Regression Definition screen, the **Table** field is autopopulated with the Case Report [sn_customerservice_case_report] table. The **Output Field** field is autopopulated with the time taken to resolve a case in seconds.

   Note: If you have upgraded, you have to run a fix script in order to show the **Time to Resolve Numeric Value** column to display values for older cases. For more information, see Configure settings for estimated time to resolve values.

3. To edit, add, or delete case attributes, modify the default values in the **Fields** field.

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The default case attributes are Short Description, Category, Assignment group, Assigned to, Priority, Product, Channel, Account, Service, Contact, Contract, and Description. These details are taken from the case record.

4. Edit the **Filter** field if you want to modify the number of past months of cases to examine. The default value is 15 months.
5. Edit the **Training Frequency** field if you want to modify the frequency of training. The default value is every 30 days.
6. Either update the changes you made or update and retrain the solution.
   - To update the changes you made, click **Update**.
   - To update and retrain the solution, click **Update and Retrain**.

Display the time to resolve ribbon component

Activate the **ETTR Experience Card** so that you can display the time to resolve ribbon component in your CSM workspaces.

Before you begin

Role required: admin

About this task

The Time to resolve ribbon component is available by default and can be displayed in both CSM Agent Workspace and CSM Configurable Workspace. You must activate the component in CSM Agent Workspace before you activate it in CSM Configurable Workspace.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Forms** > **Workspace Ribbon Settings**.
2. Select any record that has the table value **Case [sn_customerservice_case]**.
3. Increase or decrease the values in the width column to make the total combined width of all the components to 12 or less.

   Note: If the total is already exceeding 12, decrease the values for the other components before modifying the value of **ETTR Experience Card**.

4. Select **ETTR Experience Card**.
5. Select **Active**.
6. In the **Ribbon Component Attributes** form section, modify components such as the **Card title** and **Info message** as required.

   Note:
   - You can see that the Solution name is pre-filled with the default name.
   - The same procedure applies to activate the **ETTR Experience Card** in the CSM Configurable Workspace. You must activate the **ETTR Experience Card** in the CSM Agent Workspace before activating it in the CSM Configurable Workspace. Navigate to **User Experience Framework** > **Ribbon Configuration Settings** and activate. The **Ribbon Component Attributes** section is not available for modifying.

Predictive Intelligence for case management

Assist agents with case creation by requiring a minimum of information, such as the short description, and predicting values for the category, priority, and assignment group.

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From either Agent Workspace or the platform interface, agents can use this feature when creating cases by providing the short description. Based on the information entered in the **Short description** field, the Predictive Intelligence feature predicts the category, priority, and assignment group, and routes the case to the correct queue.

Plugin

The Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml) provides Predictive Intelligence capabilities for Customer Service Management. This plugin enables customers to leverage machine learning algorithms for searching related cases in CSM. This plugin requires:

- Case Management Core (com.sn_customerservice)
- Predictive Intelligence for Contextual Search (com.snc.contextual_search_ml)

The Predictive Intelligence for Customer Service Management plugin is activated automatically for new Orlando customers. Existing customers upgrading to the Orlando release must manually activate this plugin.

Solution definitions

Predictive Intelligence includes the following solution definitions for case management:

- CSM Case Categorization
- CSM Case Assignment
- CSM Case Prioritization

A solution definition predicts one or more output fields based on a configured input field. At least one solution definition must be active to use Predictive Intelligence with Customer Service Management.

For more information, see Predictive Intelligence for CSM solution definitions.

Business rules

Predictive Intelligence also includes business rules for Customer Service Management:

- Default Case Based Prediction
- Update Prediction Results

For more information, see Predictive Intelligence for CSM solution definitions.

Extension points

The Predictive Intelligence feature for Customer Service Management includes the **CSMPredictionService** extension point. This extension point contains a method that returns the following information:

- The list of solution definitions that are used to predict field values during case creation.
- The treatment of the predicted fields based on the values of the input fields.

The system administrator can use this extension point to customize the solution definitions.

Configure Predictive Intelligence for case management

Activate the Predictive Intelligence plugin and enable the related system property and client script to use Predictive Intelligence with Customer Service Management.

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Before you begin
Role required: admin

Procedure

1. Activate the Predictive Intelligence plugin (com.glide.platform_ml).
2. Enable the **Enable/Disable the prediction for case** property (*sn_customerservice.case.mlpredictor.enable*).
   a. Navigate to **Customer Service** > **Administration** > **Properties.**
   b. Enable the **Enable/Disable the prediction for case** check box.
   c. Click **Save**.
3. Enable the **Predict Case Values** client script.
   a. Navigate to **System Definition** > **Client Scripts**.
   b. Click **Predict Case Values** in the Client Scripts list.
   c. Enable the **Active** check box.
   d. Click **Update**.

Use Predictive Intelligence for case management

Agents can use Predictive Intelligence to predict values for configured fields when creating a customer service case.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task
When you create a case, the Predictive Intelligence feature predicts values for the configured fields based on the short description.

Note: If you update the case, the values for these fields are not predicted again.

Procedure

1. Create a case.
2. Enter information in the **Short description** field and then tab to the next field.

   Based on this information, the system predicts the values for the **Priority**, **Assignment group**, and **Category** fields.

   Note: If the system can't predict values based on the short description, these fields remain empty.

3. **Optional:** Change the values in the predicted fields if needed or enter values for fields where Predictive Intelligence has skipped the prediction.
   The system doesn't overwrite user-entered values for the predicted fields.

Update cases with missing field predictions

View the list of open cases for which the prediction of category, priority, or assignment group was skipped by the Predictive Intelligence feature.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice_manager or admin

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About this task

In the event that Predictive Intelligence cannot predict one or more case attributes for a case, customer service agents and administrators can update this information after a case is created. For example, the short description might not include enough detail to make a prediction.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **Cases Skipped by Predictive Intelligence**.
2. Select a case from the list.
3. Provide the missing information and click **Update**.

Configure Auto-Responder notifications

Configure the Auto-Responder feature for sharing relevant content in email notifications for deflecting cases.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

About this task

When you install and activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml), the following related plugins are also activated:

- Case Management Core plugin (com.sn_customerservice)
- Predictive Intelligence for Contextual Search plugin (com.snc.contextual_search_ml)
- Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script)

You can also configure the Auto-Responder feature for tasks other than customer service cases. For more information, see Configure Auto-Responder for tasks other than cases.

Procedure

1. Follow the steps in this link: Enable Auto-Responder.
2. Follow the steps in this link: Train the similarity solution for finding Auto-Responder notification content.
3. **Optional:** Follow the steps in this link: Configure the search context for Auto-Responder.
4. **Optional:** Follow the steps in this link: Limit the number of articles in Auto-Responder notifications for cases.
5. **Optional:** Follow the steps in this link: Include advanced contextual search results in Auto-Responder notifications.

   Note: By default, any knowledge articles viewed in the last 30 days by the user are not included in the email notification. You can use the `getViewedContent` extension point to modify the filter out by the duration of the last viewed content.

6. **Optional:** Follow the steps in this link: Enable text search recommendations in Auto-Responder notifications.
7. **Optional:** Follow the steps in this link: Include cases from communication channels in Auto-Responder.

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8. **Optional:** Follow the steps in this link: Include knowledge articles from custom portals in Auto-Responder notifications.

   Note: When you configure the Auto-Responder feature to use a custom portal, the default configuration for the customer service portal and consumer service portal are not used. Ensure that you use this configuration when you have your own custom portal and don't want to use the customer service portal or consumer service portal.

Related topics

Using Auto-Responder for case deflections

Enable Auto-Responder

Enable the Auto-Responder feature to include content suggested for deflecting cases in email notifications.

Before you begin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. In the Auto-Responder Recommendations section, select the check box for the **Enable auto-responder recommendations** property (*sn_customerservice.case.autoresponder.enable*).
3. Click **Save**.

Train the similarity solution for finding Auto-Responder notification content

Update and train a similarity solution definition to enable the Auto-Responder feature to suggest content by comparing the short description of a customer service case with those of existing knowledge articles.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

About this task

A similarity solution definition collects and compares your existing records to new similar records. The Similar Knowledge Articles All similarity solution selects knowledge articles for customer service cases from the predefined knowledge bases in the consumer service portal and customer service portal. To select knowledge articles from any custom knowledge base in a portal or from a knowledge base in any custom portal, you must modify this similarity solution.

For a similarity solution to work correctly, the Knowledge [kb_knowledge] table in the Knowledge View [sn_customerservice_knowledge_view] database view must have at least the required number of records set in the configuration of your ServiceNow instance. The default minimum number required is 10,000.

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If the Knowledge Management Advanced plugin (com.snc.knowledge_advanced) is activated, the tables for knowledge article templates (such as FAQ, How to, What Is, KCS Article) are also added to the Knowledge View [sn_customerservice_knowledge_view] database view. For a similarity solution to show results from each template type, each of the tables for the template type must have at least the required number of records. If a table doesn't have the required number of records, you might not see the results from that table. For more information, see Database View support for Predictive Intelligence.

Procedure

1. Navigate to **All** > **Predictive Intelligence** > **Similarity** > **Solution Definitions**.
2. In the Similarity Definitions list, search for and select the Similar Knowledge Articles All solution definition (ml_sn_sn_customerservice_global_similar_knowledge_view_articles).
3. On the Similarity Definition form, verify the default field values for knowledge articles.

   Note: If the application scope isn't set to Customer Service application, you cannot edit the form and a warning message appears. To make the form editable, click the word **here** at the end of the message.

Similarity Definition form

Field	Description
Label	Unique name for your similarity solution.
Word Corpus	Defines which knowledge articles and cases are selected. By default, the **All Articles and Cases** word corpus is available to search for knowledge articles similar to a customer service case short description. **Note:** Modify the word corpus to use the knowledge base defined for your portal. If you have defined custom tables for knowledge articles and article templates, you must include their fields in the word corpus content. For more information about the word corpus and word corpus content, see Create a word corpus.
Table	Table or database view that contains the knowledge article records. Set the value to the Knowledge View [sn_customerservice_knowledge_view] database view unless you use a different table or database view for storing knowledge articles. This database view joins the Knowledge [kb_knowledge], What Is [kb_template_what_is], How To [kb_template_how_to], FAQ [kb_template_faq], and KCS Article [kb_template_kcs] tables for viewing all fields in a knowledge article. After you assign a table value, the number of records that match the filter conditions is displayed as a link. **Note:** The What Is [kb_template_what_is], How To [kb_template_how_to], FAQ [kb_template_faq], and KCS Article [kb_template_kcs] tables are available only if the Knowledge Management Advanced plugin is activated. For more information, see Activate the Knowledge Management Advanced plugin.
Fields	Fields from the Knowledge View [sn_customerservice_knowledge_view] database view selected for similarity comparison with the case short description. The fields must be the same as the fields you define for the Word corpus content.

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Field	Description
Filter	Filter conditions applied on the database view to filter knowledge article records for Auto-Responder recommendations. Click **Add Filter Condition** to apply conditions to the Field records you're using as a base to retrieve your similarity results. For example, for the customer service portal, you would set a **[Workflow] [is] [Published] AND [Knowledge base] is [Customer Service]** filter condition. For a custom portal, you select the knowledge base of the custom portal in the **[Knowledge base]** condition.
Test Table	Table that contains the case records that you want to compare with knowledge article records. Set the value to the Case [sn_customerservice_case] table unless you use a different table for storing case records.
Test Fields	Fields from the case selected for similarity matching with knowledge article fields. By default, the short description field of a customer service case is used for the similarity match with knowledge article fields.
Processing Language	Dominant language of the dataset you're training on the solution definition. By default, English processing is applied to all datasets. For example, if you select Italian, the system processes the data in both English and Italian. **Note:** The term "processing" indicates some of the language-specific steps used as part of training a solution. These steps might include tokenizing words, removing stop words, and stemming.
Stopwords	Common terms in the processing language that are excluded from the search, for example, prepositions. When you select your processing language, the system automatically adds a Stopwords list that uses the same language. For example, if your processing language is Italian, the **Default Italian Stopwords** list appears. The **Default English Stopwords** list appears by default.
Training Frequency	Frequency with which the model for the similarity solution definition must be retrained.
Update Frequency	Frequency with which to include new records in the model for the similarity solution definition.

For more information, see Create and train a similarity solution.

4. **Optional:** In the Training Request Schedule related list, update the schedule for training the Similar Knowledge Articles All solution definition.
   By default, the training request schedule is **Periodically** and runs after every 30 days.
5. Click **Update & Retrain**.
6. Open the Similar Knowledge Articles All solution definition (ml_sn_sn_customerservice_global_similar_knowledge_view_articles) and in the ML Solutions related list, view the training solution progress in the **Progress** column.
   When **Progress** is 100%, in the ML Solutions related list, you can include more useful content in the Auto-Responder notification by reviewing the similarity examples based on the similarity score and updating the similarity score threshold value.
7. **Optional:** Update the similarity score threshold.

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a. In the **Active** column, click the link for the solution.

b. Review the similarity examples by clicking the **Similarity Examples** related link on the ML Solution form.
For more information, see Review solution similarity examples.

c. In the Solution Statistics related list on the ML Solution form, enter the required value in the **Similarity Score Threshold** field, right-click the ML Solution form, and then click **Save**.
For more information, see Update your similarity score threshold.

Result

When the solution is complete, the knowledge articles similar to the fields selected for a customer service case are sent as Auto-Responder recommendations.

Related topics

Knowledge article templates

Configuring the search context for Auto-Responder

You can configure the predefined search context for customer service cases to include relevant search resources in Auto-Responder email notifications.

The Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml) includes the predefined **Case Email Autoresponder KB search** search context for customer service cases configured for use in the Auto-Responder feature. This search context uses the predefined Search Knowledge Articles searcher that provides knowledge articles as search results.

By default, the **Case Email Autoresponder KB search** search context includes contextual search results based on Predictive Intelligence. You can edit this search context to include any additional resources. For more information, see Define a search context.

Note: To provide other relevant recommendations to resolve a customer service case when Predictive Intelligence results are insufficient or unavailable, you can also enable the text search recommendations in the Auto-Responder email notification. For more information, see Enable text search recommendations in Auto-Responder notifications.

Limit the number of articles in Auto-Responder notifications for cases

Send the most relevant knowledge articles in Auto-Responder notifications for customer service cases by limiting the number of knowledge articles that are included.

Before you begin

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Customer Service using the application picker. For more information, see Application picker.

Role required: admin

Procedure

1. Navigate to **All** > **Contextual Search** > **Table Configuration**.
2. Search for `Case [sn_customerservice_case]`.

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3. Click the **Case [sn_customerservice_case]** link in the **Name** column corresponding to the row containing the **Case Email Autoresponder KB Search** search context.
4. In the Email Configurations related list, double-click the value in the Limit column for the **Case auto-responder recommendations** row.
5. Enter the maximum number of knowledge articles you want to include in the Auto-Responder email notifications for customer service cases and click the save icon ( ).
   The maximum allowed limit value is 20. If you enter a limit value of more than 20, the Auto-Responder email notification includes up to 20 articles only.
6. On the Table Configuration form, click **Update**.

Include advanced contextual search results in Auto-Responder notifications

Use scripted extension points to include the advanced contextual search results in email notifications for content suggested by the Auto-Responder feature.

Before you begin

Role required: admin

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Email Notification Script for Contextual Search Results. For more information, see Application picker.

About this task

The Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script) installs the `csm_AdvancedEmailSearchResults` script, `CSMAdvancedEmailSearchResults` script include and `CSMAdvancedEmailSearchResultsExtensionPoint` extension points.

The `csm_AdvancedEmailSearchResults` script is preconfigured for the customer service portal and consumer service portal.

Using extension points makes it easier to integrate customizations without actually altering the base code. You can extend standard base functionality using customized scripts. For more information, see Using extension points to extend application functionality.

An implementation is available in the base system for scripted extension points. You can modify the data and add additional fields.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. In the **API Name** column, search for and click **sn_adv_emailscript.CSMAdvancedEmailSearchResultsExtensionPoint**.
3. On the Extension Point form, select a script include to use the `CSMAdvancedEmailSearchResultsExtensionPoint` extension points.
   - Modify the existing script by going to the Implementations related list and clicking **CaseAutoresponder**.
   - Create and register a custom script include.

     For more information, see Registering custom script includes against the scripted extension points.

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4. Modify the script to use the extension points available through the `CSMAdvancedEmailSearchResults` script include.

   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 first.

   Configuration for different extension points implementation

Configuration	Implementation
Include a custom portal and search for knowledge articles from the knowledge base associated with the custom portal. **Note:** Applies only to tasks other than customer service cases.	Modify the `updateSearchRequestConfig` extension point to include the custom portal for your tasks other than customer service cases.
Filter out the content by the duration of the last viewed content.	Modify the `getViewedContent` extension point by entering the last viewed content duration in days. **Note:** By default, any knowledge articles viewed in the last 30 days by the user are not included in the email notification.
Define the layout of the email notifications.	Modify the `printSearchResults` extension point to specify a custom layout for the Auto-Responder email notifications.

5. On the Extension Point form, click **Update**.

Registering custom script includes against the scripted extension points

Register custom script includes against a selected scripted extension point in the application code.

By registering the custom script, you create an extension instance record that links the scripted extension point definition to its implementation in the custom script include.

Enable text search recommendations in Auto-Responder notifications

Configure the Auto-Responder feature to send recommendations that match a text search of a case short description to resolve a customer service case when Predictive Intelligence results are insufficient or unavailable.

Before you begin

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Email Notification Script for Contextual Search Results using the application picker. For more information, see Application picker.

Role required: admin

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About this task

By default, the Auto-Responder feature is configured to send contextual search results based on Predictive Intelligence. Knowledge articles that have significant text similarity with the short description of a case are sent as Auto-Responder recommendations.

You can configure the Auto-Responder feature to send knowledge article recommendations that match a text search of the case short description when the recommendations sent through the Predictive Intelligence feature aren't sufficient or the feature is disabled.

Procedure

1. In the navigation filter, enter `sys_properties.list`.
2. Search for the *`sn_adv_emailscript.textsearch.enable`* property.
3. In the **Value** field, enter `true`.
4. Click **Update**.

Consumer messaging apps

Configure communication channels to provide users with options to email, call, or chat with your teams for help. You can also integrate with social media.

Before you begin

Role required: admin

About this task

You have the following options for setting up communication channels:

Procedure

- Set up the Customer Service email channel.
  Customers can send emails to create new cases and update current cases as well as receive email updates from agents as cases progress. Customer Service Management uses the ServiceNow email accounts feature to create and maintain email accounts.
  - Configure one or more email addresses.
  - Configure an email address for a product.
  - Configure an email subject line prefix
  - Set email communication channel properties
  - Create an email client template.
  - Create quick messages.
  - Create rules for incoming emails and create and assign cases.
- Set up the Customer Service phone channel.
  External customers can reach out to customer service agents using the phone communication channel. Customer Service Management uses both Computer Telephony Integration (CTI) and OpenFrame to provide phone support for customers, as well as the Notify application and the Twilio Voice product.

  OpenFrame is included with Customer Service Management. The CTI Softphone plugin (com.snc.cti) and the Customer Service CTI Demo Data (com.snc.customerservice_cti_demo) plugin must be activated separately. The Notify plugin (com.snc.notify) is activated as part of the CTI Softphone plugin.

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- Set up the phone communication channel.
- Associate a phone number with a workflow.
- Create an OpenFrame configuration.

- Set up the Customer Service chat channel.
  The chat communication channel uses the Connect Support feature to provide chat capability from the Customer Service Portal and Consumer Service Portal. You can also enable Virtual Agent to create or use predefined chatbot topics (conversations) for your users.
  - Configure the customer service chat queue.
  - Add an agent to the chat support assignment group.
  - Activate Virtual Agent for Customer Service Management
  - Activate Customer Service Virtual Agent conversations.
  - Integrate Customer Service Virtual Agent with Facebook Messenger.
- Set up the social media integration feature to support case resolution through social media channels.
  - Create a social media profile for an account, contact, or consumer.
  - Create a social media log entry for a case.

Include cases from communication channels in Auto-Responder

Send Auto-Responder email notifications for customer service cases logged using a communication channel.

Before you begin

Role required: admin

Perform the following tasks.

- Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.
- Set the application scope to Customer Service using the application picker. For more information, see Application picker.
- Ensure that the required channel is already set up for use. For more information, see Consumer messaging apps.

About this task

By default, the Case auto-responder recommendations notification is configured to send Auto-Responder email notifications for customer service cases logged using emails. You can configure it to include other communication channels such as web, phone, chat, social, community, alert, and virtual agent.

Procedure

1. Navigate to **All** > **System Notification** > **Notifications**.
2. Search for `Case auto-responder recommendations`.
3. In the **Name** column, click the **Case auto-responder recommendations** link.
4. In the **Conditions** field, click **Add Filter Condition** or **Add "Or" Clause** to set the filter condition for a communication channel.

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Note: The default filter condition is **[Channel] [is] [Email] AND [Active] [is] [true]**.

For example, to send Auto-Responder notifications for customer service cases logged using a mobile phone in addition to email, you would click **Add Filter Condition** and create the condition **[Channel] [is] [Phone] AND [Active] [is] [true]**.

Include knowledge articles from custom portals in Auto-Responder notifications

Configure the Auto-Responder feature to suggest knowledge articles from a custom portal.

Before you begin

Role required: admin

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml). For more information, see Activate a plugin and Predictive Intelligence for CSM solution definitions.

About this task

By default, the Auto-Responder feature is configured to suggest knowledge articles from customer service portal and consumer service portal. Use this procedure only when you have your own custom portal and don't want to use the default customer service portal or consumer service portal.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Properties**.
2. In the text box for the **Custom portal URL containing the knowledge article parameter** property (*sn_customerservice.case.autoresponder.customportal*), enter your custom portal URL containing a knowledge article parameter such as sys_kb_id or kb_number.
   Example format: `https://<instance-name>.service-now.com/csm?id=kb_article_view&sys_kb_id=<sys_kb_id>`
3. Click **Save**.

What to do next

After you configure the *sn_customerservice.case.autoresponder.customportal* property, you must configure the Similar Knowledge Articles All similarity solution definition to use the knowledge base of the custom portal. For more information, see Train the similarity solution for finding Auto-Responder notification content.

Configure Auto-Responder for tasks other than cases

Configure the Auto-Responder feature to send helpful resources for tasks other than customer service cases.

Before you begin

Role required: admin

Perform the following tasks.

- Activate the Email Notification Script for Contextual Search Results plugin (com.snc.adv_cxs_results_email_script). For more information, see Activate a plugin.
- Set the application scope to the scope of your task table using the application picker. For more information, see Application picker.

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- Verify that you have defined a search context for your task to include recommended resources in the Auto-Responder email notifications. For more information, see Define a search context.
- Verify that you have configured a table for the search context associated with your task. For more information, see Configure table for a contextual search.

Procedure

1. Configure the Notification [sysevent_email_action] table for your task to use the `csm_AdvancedEmailSearchResults` script.

   a. Navigate to **System Notification** > **Notifications**.

   b. Select the Notification [sysevent_email_action] table for your task.

   c. In the What will it contain related list, enter `${mail_script:csm_AdvancedEmailSearchResults}` in the **Message HTML** field.

   d. **Optional:** Verify that notifications aren't sent if there are no search results by entering the `hasResults()` function in the **Advanced condition** field of the When to send related list. The `hasResults()` function checks whether search results exist. You can use the return value of the function to avoid the system from sending an email notification if there are no search results. For more information, see Advanced conditions for email notifications.

   > **Tip:** Refer to the Case auto-responder recommendations notification that uses the `hasResults()` function for returning the search results value. To view a notification, navigate to **System Notification** > **Notifications**.

   e. Select **Update**.

2. Map your task table configuration with the email notification for your task.

   a. Navigate to **Contextual Search** > **Table Configuration**.

   b. Select the task table configuration link in the **Name** column corresponding to the row containing the search context for your task.

   For the table that you're configuring, be sure to do the following:

   - Train the similarity solution for the table. For more information, see Train the similarity solution for finding Auto-Responder notification content.
   - Add the similarity solution in the Additional Resource Configurations tab on the Search Context form.

   c. In the Email Configurations related list, link your task table configuration with the Notification [sysevent_email_action] table.

   - To create another email configuration for a user field, select **New**.
   - To edit an existing email configuration, select the preview email configuration for email notification icon (ⓘ), and then in the Email Configuration window, select **Open Record**.

   d. On the Email Configuration form, verify the default field values for your task, or fill in the values for a custom configuration.

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Email Configuration form

Field	Description
Email notification	Select the email notification for your task.
User field	Reference field that helps narrow down the search results sent as recommended resources in Auto-Responder email notifications. For example, if you select **Caller** for the Incident [incident] table, the resources associated only with callers are added to the Auto-Responder email notifications. **Note:** This is a mandatory field for Auto-Responder. This field must be a reference field of the User table (sys_user) or tables that extend the User table.
Limit	Maximum number of resources you want to include in the Auto-Responder email notifications for your task. The maximum allowed limit value is 20. If you enter a value more than 20, the Auto-Responder email notification includes up to 20 resources only.

e. Update or submit the Email Configuration form.

- For a new configuration, select **Submit**.
- For an existing configuration, select **Update**.

3. **Optional:** Enable contextual search results based on text searches in addition to search results based on Predictive Intelligence to be included in Auto-Responder notifications.
   For more information, see Enable text search recommendations in Auto-Responder notifications.
4. **Optional:** Configure a custom portal and include advanced contextual search results in email notifications.
   For more information, see Include advanced contextual search results in Auto-Responder notifications.

Set up self-service

Create a self-service portal to help customers resolve issues independently and access information through integrated knowledge bases, chatbots, and appointment booking features.

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Portals Set up and customize self-service portals to provide customers with access to knowledge bases, service catalogs, and other essential features.	**Walk-up Experience** Set up Walk-up Experience to configure a contact channel to support both online check-in and onsite check-in to a service center.	**Conversational Appointment Booking** Set up Conversational Appointment Booking to enable customers to book, reschedule, and cancel appointments from Virtual Agent conversations.
Configurable Portal Widgets Configure the behavior, content, and layout of a portal by configuring instance options on Configurable Portal widgets.	**Web Embeddables** Embed ServiceNow components into external websites to interact with the ServiceNow platform without requiring users to access the ServiceNow instance.	

Portals

Set up and customize self-service portals to provide customers with access to knowledge bases, service catalogs, case management, and other essential features through configurable interfaces. Choose from Customer and Consumer Service Portals or Business and Consumer Portal based on your organizational needs.

Walk-up Experience

Set up Walk-up Experience to support both online and onsite check-ins at your service center. Configure the experience to fit the needs of your organization.

Conversational Appointment Booking

Install and set up the Conversational Appointment Booking application to enable customers to book, reschedule, or cancel appointments through Virtual Agent conversations.

Configurable Portal Widgets

Use Configurable Portal widgets to configure widget behavior, visual appearance, and content. Update the information presented on widgets through instance options to reduce the work required to implement and maintain widgets for your users.

Web Embeddables

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Use Web Embeddables to embed ServiceNow components into external websites outside of the ServiceNow environment. Use the default components or create custom components to interact with the ServiceNow platform through dedicated APIs that enable real-time data exchange without requiring users to directly access the ServiceNow instance.

Set up Engagement Messenger

With the Engagement Messenger web application, your customers can easily access the information or services they need from your third-party web applications, even if they're located outside of the ServiceNow environment.

Configure portals

Set up and customize self-service portals to provide customers with access to knowledge bases, service catalogs, case management, and other essential features through configurable interfaces.

Customer and Consumer Service Portals	Business and Consumer Portal
Set up the Customer and Consumer Service Portals to provide information and support to your customers.	Set up the Business and Consumer Portal to provide self-service capabilities through configurable portal widgets.

Portals provide self-service capabilities that enable customers to resolve issues independently and access information efficiently. ServiceNow offers multiple portal options to meet different organizational needs and customer preferences.

Customer and Consumer Service Portals

Create and enable self-service portals for your customers to support their needs efficiently. Integrate these portals with knowledge bases, communities, service catalogs, and chatbots. These portals provide a comprehensive self-service experience with features like AI-powered search, guest user access, and multi-factor authentication support.

Business and Consumer Portal

Set up the Business and Consumer Portal to provide self-service capabilities for your customers and consumers through configurable portal widgets. Enable low-code customization of portal pages to reduce maintenance effort while delivering essential features like knowledge articles, service catalogs, case management, Virtual Agent, and appointment booking to support consumer needs efficiently.

Related topics

Set up Configurable Portal widgets

Configure the Customer and Consumer Service Portals

Configure the Customer and Consumer Service Portals to provide information and support for your customers.

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Before you begin
Role required: sp_admin

About this task
The Customer and Consumer Service Portals are self-service web portals based on the ServiceNow Service Portal application.

The Customer Service Portal supports your business-to-business (B2B) customers and the Consumer Service Portal supports your business-to-consumer (B2C) customers.

Use the portals to provide information and support for your customers. The portals provide a basic format that customers can use to search for information or request assistance from a customer service agent. They include the following features:

- A header with links for different customer activities.
- A search feature that customers can use to search for information from several repositories.
- Links to information sources such as the knowledge base, the user community, and customer support.

Note: The Customer Service Portal is automatically installed when you activate the Customer Service plugin.

To activate the Consumer Service Portal, activate the Consumer Service plugin.

https://player.vimeo.com/video/1090650733?h=0d29c5ff48&badge=0&autopause=0&player_id=0&app_id=58479%22

Procedure
1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Customer Service Portal (B2B) or the Consumer Service Portal (B2C) category, view the list of tasks to configure the feature.

Customer and Consumer Service Portal configuration tasks

Task	Description
Customize the Customer Service Portal	Customize the Customer Service Portal to meet your needs.
Activate the Consumer Service Portal	Activate the Consumer Service Portal plugin.
Customize the Consumer Service Portal	Customize the Customer Service Portal to meet your needs.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics
Service Portal

Activate the Consumer and Customer Service Portals
Activate the portal plugins to use the Consumer and Customer Service Portals.

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Before you begin
Role required: admin

Procedure

1. Navigate to the ServiceNow store application or **All** > **System Definitions** > **Plugins** in the CSM application.
2. Install any one of the following plugins.

Plugin name	Plugin.
Customer Service Portal	com.snc.customer_service_portal
Consumer Service Portal	com.snc.consumer_service_portal

3. Select **Activate**.

Setup the Customer and Consumer Service Portals

Customize the Customer and Consumer Service Portals to meet your needs.

Before you begin
Role required: sp_admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
Some of the components that you can customize include:

- Branding: Configure the portal branding to give your Customer Service Portal its own look and feel. The default theme for Customer and Consumer Service portals is the Coral theme.
- Menus: Configure the portal header menu to set up the main menu, one of the main navigation controls for your users.
- Homepage: Assign a homepage to the portal.
- Widgets: Use Service Portal widgets to define the content in your portal.
- Roles: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.

Related topics

Consumer Service Portal properties

Configure AI Search for the Customer and Consumer Service Portals

You must configure the Customer and Consumer Service Portals to use AI Search.

Before you begin
You must install a CSM or CSP portal and AI Search integration for CSM and CSP Portals.

Role required: sp_admin

About this task
AI Search is inactive by default and you must enable it by updating the portal record.

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Procedure

1. Navigate to **All** > **Service Portal** > **Portals** and open a portal record.
2. Select **Customer Support** for CSM portal or select **Customer Service** for CSP portal.
3. Select the **Enable AI Search** check box.
4. In the **Search Application** field, search and select either **CSM Portal Default Search Application** or **CSP Portal Default Search Application** for CSM and CSP portals respectively.
   A search application configuration defines search experience settings, such as the search engine, search results limit, and suggestions limit. A search application configuration is selected by default, but you can select a different configuration if needed.

   Note: You might have to configure the form layout to add **Search Application** field on the form. For more information about adding fields to a form, see Configuring the form layout.

5. In the **Search Results Configuration** field, search and select either **CSM Portal Search** or **CSP Portal Search**.
   A search result configuration defines how search results are displayed. A search result configuration is selected by default, but you can select a different configuration if needed.

   Note: You might have to configure the form layout to add **Search Results Configuration** field on the form. For more information about adding fields to a form, see Configuring the form layout.

6. Select **Update**.
7. Navigate to **Page Route Maps** and enable the **CSM AI Search Home Page** route map for CSM and **CSP AI Search Home Page** for CSP as they're inactive by default.

Related topics

Using Now Assist in portal case form

Enable AI search in the Customer and Consumer Service Portals for unauthenticated users

An administrator activates the AI search widgets so that guest users logging in to the Customer and Consumer Service Portals can use the AI search feature.

Before you begin

Role required: sp_admin
You must configure AI Search for the Customer and Consumer Service Portals. For more information, see Enable and configure AI Search in Service Portal.

Procedure

1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Search for **Typeahead Search**.
3. Click **Typeahead Search**.
4. Select the **Public** check box.
5. Click **Update**.
6. Repeat the steps for the **AI Search Assist** widget.

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AI Search Assist for authenticated external users

Enable AI Search Assist in the Customer and Consumer Service Portals for authenticated external users with the snc_external role.

Configure AI Search Assist Actions for authenticated external users

Enable the AI Search Assist Actions to search knowledge articles in the Customer and Consumer Service Portals. It applies for authenticated external users with the snc_external role.

Before you begin

Activate Customer Service Management

You must configure AI Search for the Customer and Consumer Service Portals. For more information, see Enable and configure AI Search in Service Portal.

You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: web_service_admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist Action (Internal API)**.
3. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Order [sc_cat_item]**.
4. On the Order [sc_cat_item] page, in the **Security** tab, do the following:
   a. Select the **Requires authentication** to turn on the authentication.
   b. Clear the **Requires SNC Internal** checkbox to turn off the feature.
   c. Select **Update**.
5. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Resolves my issue**.
6. On the Resolves my issue page, do the following:
   a. Select the **Requires authentication** to turn on the authentication to access resource.
   b. Clear the **Requires SNC Internal** check box.
   c. Select **Update**.
7. Select **Update**.

Related topics

Using Now Assist in portal case form

Configure AI Search Assist in the Customer and Consumer Service Portals for authenticated external users

Enable the AI Search Assist to search knowledge articles in the Customer and Consumer Service Portals. It applies for authenticated external users with snc_external role.

Before you begin

Activate Customer Service Management

You must configure AI Search for the Customer and Consumer Service Portals. For more information, see Enable and configure AI Search in Service Portal.

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You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI Search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: web_service_admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist (Internal API).**
3. On the AI Search Assist (Internal API) page, in the Resources related list, select **search**.
4. On the search page, in the **Security** tab, do the following:
   - Select the **Requires authentication** to turn on the authentication to access resource.
   - Clear the **Requires SNC Internal** check box.
   - Select **Update**.
5. Select **Update**.

Related topics

Using Now Assist in portal case form

Activate the standard ticket page for upgrade customers

If you have upgraded your instance, redirect the ticket page to the standard_ticket page in the Service Portal and view requests on the standard ticket page.

Before you begin

Role required: sp_admin

About this task

For new customers, the standard ticket page is enabled by default. For upgrade customers, you must enable it.

Procedure

1. Navigate to **All** > **Service Portal** > **Page Route Maps**.
2. Search for CSM Standard Ticket.
3. Set the value to **true** in the **Active** column.
4. Select the name of the page route map.
5. Select **here** to edit the record.
6. Select the **Active** check-box.
7. Select **Update**.

Related topics

Standard ticket page

Configure the standard ticket page for cases

You can configure the standard ticket page for customer service cases from where users can view the details of a case in the Service Portal.

Before you begin

Role required: sp_admin

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Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Click sn_customerservice_case, csm_order case, sn_customerservice_task, or customer_project_task which is available by default.

   Note: You can add your own case types and add new configurations for the required tables. For more information, see Configure the standard ticket page.

3. Click **here** to edit the record.
4. Edit the fields on the Ticket Configuration form as required.
   For example, you can add tabs to the existing **Activity** and **Attachments** tabs in the **Info fields** field under the Info Region tab.
5. Click **Update**.

Related topics

Configure the standard ticket page

Activate the sitemap configuration and definition records for the Consumer Service Portal

Include knowledge articles and catalogs in your sitemap by activating the sitemap configuration and definition records.

Before you begin

- Activate Sitemap Generator
- Verify that an unauthenticated user can access the knowledge base article and catalogs by accessing it as a guest user.
- Verify that the Public option is selected on the Knowledge Article form or Service Catalog page form.

Role required: admin

About this task

Beginning with the Brazil release, the Sitemap Generator configuration is available with the base system and is inactive by default.

Procedure

1. Navigate to **All** > **Sitemap Generator** > **Sitemap Configuration**.
2. In the UX Sitemap Configurations [sys_ux_seo_sitemap_config] table, select the sitemap_config_CSP record.
3. Enable the generation of sitemaps.
   a. On the form, select the **Active** check box.
   b. In the Sitemap Config Definition related list, double-click the **Active** field and select the **true** option from the list.
   c. Select the Save icon ( ).
4. Select **Update**.

Result

All active sitemaps regenerate once in a day and include content from any of their active sitemap definitions.

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Related topics

Sitemap generator for the Consumer Service Portal

Limit access to product model data on the Customer Service Portal

Use a system property to limit customer access to data in the Product Models table.

From the Customer Service Portal, product model data can be accessed by external users with the sn_esm_user role. System administrators can use the *csm_cmdb_model.customer_visible_flag* system property and the **Customer Visible** field on the Product Models table (cmdb_model) and child tables to limit this access.

The *csm_cmdb_model.customer_visible_flag* system property enables the **Customer Visible** field for the tables listed below.

By default, this property is set to true.

When set to true the system uses the setting in the **Customer Visible** field to determine access to product model data on the Customer Service Portal.

- Product Models table (cmdb_model)
- Software Models table (cmdb_software_product_model)
- Application Models table (cmdb_application_product_model)
- Consumable Models table (cmdb_consumable_product_model)
- Facility Models table (cmdb_facility_product_model)
- Hardware Models table (cmdb_hardware_product_model)

The Model Categories table (cmdb_model_category) does not have a **Customer Visible** field. Access to model categories data is restricted by using the **Customer Visible** field on the Product Model table. Only the categories for the products which are visible in the Product Model table will be visible in the Model Categories table.

For upgrades from Jakarta to madrid, the **Customer Visible** field is added to each record in the Product Models table and set to false.

To limit access:

1. Set the *csm_cmdb_model.customer_visible_flag* system property to true.
2. Customize the Product Models table (cmdb_model) and add the **Customer Visible** column.
3. Set the value of the **Customer Visible** field to true for the product models that should be visible to external customers.

External users can see these product using these product models if the products are linked to the customer account.

View the number of portal bot-based sessions

Ensure customers are not incorrectly billed by viewing the number of bot-based sessions. CSM portal usage sessions are billable to customers but sometimes customers are unnecessarily charged for sessions generated due to bots, crawlers, and DDOS attacks.

Before you begin

Role required: usage_admin

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About this task

For all new portals you create, bot sessions are captured in the Service Portal Bot Sessions [ua_sp_bot_session] table and all session types are captured in the Service Portal Usage [ua_sp_usage] table.

Procedure

1. Navigate to **All** > **Reports** > **View/Run**.
2. Enter `customer portal usage` in the **Search** field.
3. Select the **Customer Portal Usage** report from the drop-down list.
   The report shows the session count for all sessions and a separate count of sessions generated due to bots, crawlers, and DDoS attacks.

Related topics

Usage calculation of self-service experiences

Multi-factor authentication for Customer and Consumer Service Portals

Multi-factor authentication, also known as two-step verification, is a security requirement that asserts a user enter more than one set of credentials.

Enable multi-factor authentication for Customer and Consumer Service Portal users so that access to the self-service web portals is more secure from potential vulnerabilities. For more information, see Multifactor authentication (MFA).

Multi-factor authentication properties

Use properties to enable role-based multi-factor authentication criteria and configure the behavior.

Properties for multi-factor authentication

Property	Description
Enable Multi-factor authentication [glide.authenticate.multifactor]	Select this check box to enable users and administrators to use this feature. • Type: enabled | disabled • Default value: enabled • Location: **Multi-factor Authentication** > **Properties**
Number of times a user can bypass setting up multi-factor authentication [glide.authenticate.multifactor.setup.bypass.count]	Enter a number that represents how many times a user can skip the additional passcode requirement, allowing them to log in even without their mobile device. If you disable this feature and then re-enable it, the counter starts over again. • Type: string • Default value: 3 • Location: **Multi-factor Authentication** > **Properties**

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Properties for multi-factor authentication (continued)

Property	Description
The time in minutes, the one-time code sent to user's email address is valid for [glide.multifactor.onetime.code.validity]	Enter a number in minutes that specifies how long the reset code is valid. See Log on with multi-factor authentication. • Type: string • Default value: 10 • Location: **Multi-factor Authentication** > **Properties**
Additional time in seconds for which the code will be valid to accommodate for the clock skew. Max value is 60 seconds. [glide.authenticate.multifactor.clock_skew]	Enter a number in seconds with a maximum of 60. By default, the instance validates the code entered by you against the single app-generated code generated at whatever the `current time` is. You can skew the time window with this property and allow one or more codes generated during a time window to be considered valid. The property's value is used in the following calculation: `current time - x/2` and `current time + x/2`, where 'x' is the value of this property. If you use the value of `10`, for example, the instance considers any codes generated by the app between the time range `[the current time - 5 seconds]` and `[current time + 5 seconds]` to be valid. Use this property to help prevent log in issues where you're unable to enter the correct code in the default time allotted.

Configure roles for multi-factor authentication

Add the following external roles to the multi-factor roles:

- sn_customerservice.customer
- sn_customerservice.consumer

Users with these roles are required to use multi-factor authentication. For more information, see Configure user-based multi-factor criteria.

Related topics

Multi-factor authentication for Business and Consumer Portal

Customer Service Portal user roles

Configure Business and Consumer Portal

Configure the business and consumer portal to provide information and support for your customers.

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Before you begin
Role required: sp_admin

About this task
The Business and Consumer Portals are self-service web portals based on the ServiceNow Service Portal application.

The Business Portal supports your business-to-business (B2B) customers and the Consumer Portal supports your business-to-consumer (B2C) customers.

https://player.vimeo.com/video/1083575309?h=447472a1c0&badge=0&autopause=0&player_id=0&app_id=58479

Use the portals to provide information and support for your customers. The portals provides ready to use features that require minimal setup. These include:

- Header and footer with links for different customer activities.
- Home page provides a summary of essential items to the logged-in user.
- Hierarchical menu to systematically navigate to different portal pages.
- Unified browse experience for knowledge and catalog through taxonomy topics.
- List pages to browse, search, and filter through records of cases, products, orders, and others.
- Record view pages to view key information, related actions, related lists, and quick links of a record.

You can add additional self-service capabilities such as order management by installing the respective plugin.

Note:

- The Business Portal Store app is automatically installed when you install the Customer Service Portal store app (from version 24.0.0 and above).
- The Consumer Portal Store app is automatically installed when you install the Consumer Service Portal store app (from version 24.0.0 and above).

For details, see Activate the Consumer and Customer Service Portals.

Procedure
1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portals page, in the Title column, enter `*business portal` or `*consumer portal`.
3. Select **Business Portal** or **Consumer Portal**.
   A page opens in your instance where you can configure the Business or Consumer Portal.
4. Clear **Inactive** check box.

   Note: The Business Portal and Consumer Portal is inactive by default.

5. Select **Update**.
   You can access the Business Portal using the URL, <servicenow instance URL>/business_portal and Consumer Portal using the URL, <servicenow instance URL>/consumer_portal.

Related topics
Service Portal

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Setup Business and Consumer Portal

Configure the Business Portal to match your organization's requirements, including branding, menus, home pages, widgets, and search sources.

Before you begin

Role required: sp_admin

Procedure

Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
Some of the components that you can customize include:

- Branding: Configure the portal branding to give your Business Portal and Consumer Portal portal their own look and feel. The Coral theme is available for the Business and Consumer Portal portal.
- Menus: Update the base system menu or add a new one. For details, see Configure the portal header menu.
- Home page: Update the default home page by updating the widget configuration or assign a custom home page. For details, see Assign a homepage to the portal.
- Widgets: Use configurable portal widgets to define the content in your portal. For details, see Configurable Portal widget library.
- Header: Update the header configuration according to your need. For details, see Configure the Portal Polaris Header widget for your portal
- Footer: Customize information at the bottom of the page. For details, see Configure the Portal Polaris Footer widget.
- Taxonomy: Configure a taxonomy on Business and Consumer Portal to define topics relevant to your users.
- List pages: Browse, search & filter through records of cases, products, orders, and others. For details, see Add and configure the Portal Data List widget
- Roles: Configure page security by role to either set up pages to be public (no login required) or to filter them by user role.
- Search sources: Configure a search source for the portal to describe the behavior and source of searchable data. For details, see Define a search source.
- Knowledge base: Configure a knowledge base for the portal to view the associated knowledge articles. For details, see Configure knowledge bases for a portal.
- Catalog: Configure a catalog for Business and Consumer Portal portal. For details, see Configure a catalog in Service Portal.

Related topics

Set up Configurable Portal widgets

Business Portal user roles

Setup the theme for Business and Consumer Portals

Customize the theme of the Business and Consumer Portals to add font and theme style sheets.

Before you begin

Role required: sp_admin

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About this task

The default theme for the Business and Consumer Portals is the Coral Theme. You can use your own theme according to your branding.

You must customize your theme to add font or theme size-related style sheets.

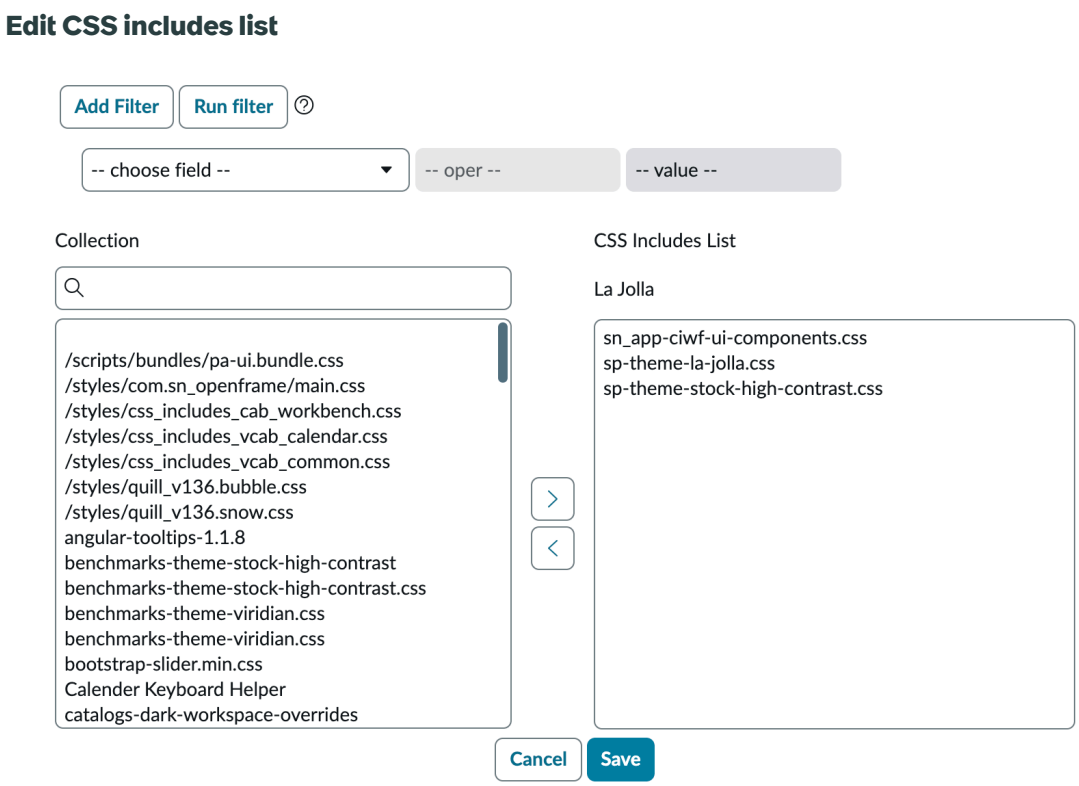
Procedure

1. Navigate to **All** > **Service Portal** > **Themes**.
2. Search and select the required theme.
3. Add font and theme style sheets.

   a. On the theme record, select the **CSS Includes** in the related list.

   b. Select **Edit**.

   c. Add the following style sheets from the Collection list to the CSS Includes list:



   - portal-polaris-set-base-font
   - portal-polaris-rem-px-theme
   - portal-polaris-kb-rem-px-theme

   d. Select **Save**.

4. Hover over the style sheet and select the preview icon (ⓘ) then select **Open Record** to set the order of added style sheets.

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a. Set the order of portal-polaris-set-base-font as the lowest.

b. Set the order of portal-polaris-rem-px-theme as second highest.

c. Set the order of portal-polaris-kb-rem-px-theme as the highest.

Note: Convert any font or theme size from rems to pixel in the CSS with a conversion factor of 10. For example, 10 rems should be changed to 100 pixel.

5. Select **Update**.

Related topics

Portal Polaris Header widget

Configure a taxonomy on Business and Consumer Portal to define topics relevant to your users

Configure a taxonomy on the Business or Consumer Portal to organize topics that are relevant to your users, such as orders, returns, or payments.

Before you begin

Role required: sp_admin

About this task

Add or edit taxonomy and child topics to the Business and Consumer portal. Taxonomy enables you to define topics which are relevant to your users.

For example, topics relevant to an e-commerce site can be orders, returns, payments, and others. Your users can find the relevant topic and then use available articles and catalog items of that topic.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. Search and select `*business portal` or `*consumer portal` in the Title column on the Service Portals page.
3. Select **Business Portal** or **Consumer Portal**.
   If a message appears about the application scope, select **here** to be able to edit the record.
4. In Related Lists, select **Taxonomy**.
5. Select **Edit**.
6. On the Edit Members page, move the required taxonomy from **Collection** to the **Taxonomy List**.
   You can also create a taxonomy. For more information, see Create taxonomy.

   Note: Only one taxonomy can be associated with a portal.

7. Select **Save**.

What to do next

Create and associate topics to the new taxonomy and associate catalog items and knowledge articles to the topics created. For details, see Associate connected content to a topic.

Related topics

Create and associate topics

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Configure AI Search for Business and Consumer Portal

Enable AI Search on a Business or Consumer Portal by updating the portal record.

Before you begin

Role required: sp_admin

About this task

AI Search is disabled by default. You can enable it by updating the portal record.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals** and open a portal record.
2. Select **Business portal** or **Consumer portal**.
3. Select the **Enable AI Search** check box.
4. In the **Search Application** field, search and select the required search application.
   A search application configuration defines search experience settings, such as the search engine, search results limit, and suggestions limit. A search application configuration is selected by default, but you can select a different configuration if needed.

   You can modify existing search application configurations such as CSM Portal Default Search Application, or create and configure your own search application configurations with AI Search specified as the search engine. For details, see Create a search application configuration for AI Search.

   Note: You may need to configure the form layout to add **Search Application** field on the form. For more information about adding fields to a form, see Configuring the form layout.

5. In the **Search Results Configuration** field, search and select the required search results configuration.
   A search result configuration defines how search results are displayed. A search result configuration is selected by default, but you can select a different configuration if needed.

   You can modify existing search results configuration record such as CSM Search or create and configure your own search results configuration.

   Note: You may need to configure the form layout to add **Search Results Configuration** field on the form. For more information about adding fields to a form, see Configuring the form layout.

6. Select **Update**.

Enable AI search in the Business and Consumer Portals for unauthenticated users

Activate the AI search widgets to allow guest users logging in to the Business and Consumer portal to use the AI search feature.

Before you begin

Role required: sp_admin
You must configure AI Search for the Business and Consumer portal. For more information, see Enable and configure AI Search in Service Portal.

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Procedure

1. Navigate to **All** > **Service Portal** > **Widgets**.
2. Search for **Typeahead Search**.
3. Select **Typeahead Search**.
4. Select the **Public** check box.
5. Select **Update**.
6. Repeat the steps for the **AI Search Assist** widget.

Configure the standard ticket page for cases

Configure the standard ticket page for cases from where users can view the details of a case in the Business portal.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Standard Ticket** > **Standard Ticket Configuration**.
2. Select sn_customerservice_case, or sn_customerservice_task which is available by default.

   Note: You can add your own case types and add new configurations for the required tables. For more information, see Configure the standard ticket page.

3. Select **here** to edit the record.
4. Edit the fields on the Ticket Configuration form as required.
   For example, you can add tabs to the existing **Activity** and **Attachments** tabs in the **Info fields** field under the Info Region tab.
5. Select **Update**.

Related topics

Configure the standard ticket page

AI Search Assist for authenticated external users

Enable AI Search Assist in the Business and Consumer portal for authenticated external users with the snc_external role.

Configure AI Search Assist Actions for authenticated external users in Business and Consumer Portal

Enable the AI Search Assist Actions to search knowledge articles in the Business and Consumer portal. It applies for authenticated external users with the snc_external role.

Before you begin

You must configure AI Search for the Business and Consumer portal. For more information, see Enable and configure AI Search in Service Portal.

You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: web_service_admin

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About this task

https://player.vimeo.com/video/1102476331?h=777fd80fa4&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist Action (Internal API)**.
3. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Order [sc_cat_item]**.
4. On the Order [sc_cat_item] page, in the **Security** tab, do the following:
   a. Select the **Requires authentication** to turn on the authentication.
   b. Clear the **Requires SNC Internal** checkbox to turn off the feature.
   c. Select **Update**.
5. On the AI Search Assist Actions (Internal API) page, in the Resources related list, select **Resolves my issue**.
6. On the Resolves my issue page, do the following:
   a. Select the **Requires authentication** to turn on the authentication to access resource.
   b. Clear the **Requires SNC Internal** check box.
   c. Select **Update**.
7. Select **Update**.

Configure AI Search Assist for authenticated external users in the Business and Consumer Portal

Enable the AI Search Assist to search knowledge articles in the Business and Consumer Portal.

Before you begin

Role required: Authenticated external users with snc_external role

Activate Customer Service Management

You must configure AI Search for the Business and Consumer Portal. For more information, see Enable and configure AI Search in Service Portal.

You must enable the Typeahead Search and AI Search Assist for the authenticated external users to use the AI Search feature. For more information on the widgets, see Typeahead Search widget and AI Search Assist widget.

Role required: admin

Procedure

1. Navigate to **All** > **System Web Services** > **Scripted Web Services** > **Scripted REST APIs**.
2. On the Scripted REST APIs page, search and select **AI Search Assist (Internal API).**
3. On the AI Search Assist (Internal API) page, in the Resources related list, select **search**.
4. On the search page, in the **Security** tab, do the following:

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- Select the **Requires authentication** to turn on the authentication to access resource.
- Clear the **Requires SNC Internal** check box.
- Select **Update**.

5. Select **Update**.

Business and Consumer portal usage calculation

Track how your customers and employees are using the portal. The Customer Portal Usage dashboard provides information about portal visits resulting in session counts.

To view the Customer Portal Usage dashboard, navigate to **Customer Service** > **Administration** > **Portal Usage**.

Note: You can ignore the bot session usage that is captured as part of this dashboard.

A user session is a period of activity on the Customer service portal, Consumer Service Portal, or Business and Consumer portal by any of the following session types:

- Guest session: Session where the user isn't logged in
- Bot session: Separate count of sessions generated due to bots and crawlers
- External session: Session where the user is an external user, typically a customer, or consumer who is logged in

The aggregate session count is based on the following

calculations:

A user session times out after a specific period of inactivity.

User access to the self-service portals is tracked as follows: per session, per day, and per portal. If the same user logs in from multiple browsers or devices, each login is counted as a separate visit. Each first call of a portal page starts a session and, the usage metrics are calculated for the 24 hours window.

The default session timeout is 30 minutes. This setting can be adjusted using a system property. For more information about modifying the session timeout setting, see Manage user sessions.

Site visit calculation examples

A user logs in, logs out, and then logs in again.

Example of a site visit calculation for a user who logs in, logs out, and then logs in again

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No

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Example of a site visit calculation for a user who logs in, logs out, and then logs in again (continued)

Step	User activity	Billable count incremented
3	User logs out	No
4	User logs in immediately after logging out	Yes

A user logs in and continues the session past midnight:

Example of a site visit calculation for a user who logs in and continues the session past midnight

Step	User activity	Billable count incremented
1	User visits the portal as an anonymous or guest user	Yes
2	User logs in	No
3	User session continues past midnight	**Yes**
4	User logs out	No

Related topics

Usage calculation of self-service experiences

Limit access to product model data on the Business and Consumer Portal

Use a system property to limit customer access to data in the Product Models table.

External users can access the product model data from the Business and Consumer Portal with the sn_esm_user role. System administrators can use the *csm_cmdb_model.customer_visible_flag* system property and the **Customer Visible** field on the Product Models table (cmdb_model) and child tables to limit this access.

The *csm_cmdb_model.customer_visible_flag* system property enables the **Customer Visible** field for the tables listed below.

By default, this property is set to True.

When set to true, the system uses the setting in the **Customer Visible** field to determine access to product model data on the Business and Consumer Portal.

- Product Models table (cmdb_model)
- Software Models table (cmdb_software_product_model)
- Application Models table (cmdb_application_product_model)
- Consumable Models table (cmdb_consumable_product_model)
- Facility Models table (cmdb_facility_product_model)
- Hardware Models table (cmdb_hardware_product_model)

The Model Categories table (cmdb_model_category) does not have a **Customer Visible** field. Access to model categories data is restricted by using the **Customer Visible** field on the Product Model table. Only the categories for the products which are visible in the Product Model table will be visible in the Model Categories table.

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For upgrades from Jakarta to madrid, the **Customer Visible** field is added to each record in the Product Models table and set to false.

To limit access:

1. Set the `csm_cmdb_model.customer_visible_flag` system property to true.
2. Customize the Product Models table (cmdb_model) and add the **Customer Visible** column.
3. Set the value of the **Customer Visible** field to true for the product models that should be visible to external customers.

External users can see these product using these product models if the products are linked to the customer account.

Multi-factor authentication for Business and Consumer Portal

Enable multi-factor authentication for Business and Consumer portal users so that access to the self-service web portals is more secure from potential vulnerabilities.

Multi-factor authentication, also known as two-step verification, is a security requirement that asserts a user enter more than one set of credentials. For more information, see Multi-factor authentication.

Multi-factor authentication properties

Use properties to enable role-based multi-factor authentication criteria and configure the behavior.

Properties for multi-factor authentication

Property	Description
Enable Multi-factor authentication [glide.authenticate.multifactor]	Select this check box to allow users and administrators to use this feature. • Type: enabled | disabled • Default value: enabled • Location: **Multi-factor Authentication** > **Properties**
Number of times a user can bypass setting up multi-factor authentication [glide.authenticate.multifactor.setup.bypass.count]	Enter a number that represents how many times a user can choose to skip the additional passcode requirement. This gives your users the ability to still log in the instance if they do not have their mobile device with them. If you disable this feature and then re-enable it, the counter starts over again. • Type: string • Default value: 3 • Location: **Multi-factor Authentication** > **Properties**
The time in minutes, the one time code sent to user's email address is valid for	Enter a number in minutes that specifies how long the reset code is valid. See Log on with multi-factor authentication.

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Properties for multi-factor authentication (continued)

Property	Description
[glide.multifactor.onetime.code.validity]	• Type: string • Default value: 10 • Location: **Multi-factor Authentication** > **Properties**
Additional time in seconds for which the code will be valid to accommodate for the clock skew. Max value is 60 seconds. [glide.authenticate.multifactor.clock_skew]	Enter a number in seconds with a maximum of 60. By default, the instance validates the code entered by the user against the single app-generated code generated at whatever the `current time` is. You can skew the time window with this property and allow one or more codes generated during a time window to be considered valid. The property's value is used in the following calculation: `current time - x/2` and `current time + x/2`, where 'x' is the value of this property. If you use the value of `10`, for example, the instance considers any codes generated by the app between the time range `[the current time - 5 seconds]` and `[current time + 5 seconds]` to be valid. Use this property to prevent log in issues where the user is unable to enter the correct code in the default time allotted.

Configure roles for multi-factor authentication

Add the external role sn_customerservice.customer to the multi-factor roles.

Users with this role is required to use multi-factor authentication. For more information, see Configure user-based multi-factor criteria.

Configure Walk-up Experience for Customer Service Management

Configure various aspects of Walk-up Experience based on the specific requirements of your organization. Walk-up Experience users with the sn_csm_walkup.walkup_admin role and administrators can activate and configure the application to meet specific requirements.

Before you begin

Role required: admin

About this task

There is a sequence of tasks that enable you to configure CSM Walk-up Experience. Perform these tasks based on the plugin you activated.

You can configure appointments, decide when to send notifications to users, establish and configure physical queue locations and operating schedules, integrate with CSAT surveys, and

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associate stockrooms with queue locations. You can also customize your Walk-up Experience portal with a unique logo and branding.

To configure CSM Walk-up Experience, use the configuration tasks listed in the table below which takes you through the entire configuration process.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration**.
2. Complete the following tasks to configure the CSM Walk-up Experience feature.

CSM Walk-up Experience configuration tasks

Task	Description
Activate CSM Walk-up Experience.	Activate the Walk-up for CSM plugin (com.snc.walkup_for_csm). For details. see Activate Walk-up Experience for Customer Service Management. **Note:** This plugin includes demo data.
Click **Walk-up Locations** for configuring locations.	Create walk-up location queues with custom schedules, assignment groups, average wait time, and more. For more information about configuring locations, see Configure Walk-up Experience locations.
Click **Schedules**.	View, create, or modify walk-up venue schedules, such as 8-5 weekdays, and associate them to the walk-up location queues. For more information about configuring schedules, see Configure Walk-up Experience schedules.
Click **Appointment Configurations** for configuring appointments.	Create service configurations for individual walk-up queue locations. You can configure schedules, number of appointments allowed per day, how far in the future users can book appointments, and more. For more information about configuring appointments, see Configure appointment booking.
Click **Portal Configurations** for configuring a portal.	Create and modify custom Walk-up Experience online and on-site service portals. For more information about configuring the portal, see Configure the Walk-up Experience portal.
Click **Notifications** for configuring notifications.	Access and configure alerts that keep users and fulfillers informed of events that concern them. For more information about configuring notifications, see Configure Walk-up Experience notifications.
Surveys	Access customer satisfaction surveys and enable public access to the surveys, set survey trigger conditions, and view user

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Task	Description
	responses. For more information about configuring schedules, see CSM Walk-up Experience customer satisfaction surveys.

Activate Walk-up Experience for Customer Service Management

You can activate the Walk-Up for CSM plugin (com.snc.walkup_for_csm) for Walk-up Experience if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they aren't already installed.

Before you begin

Walk-up Experience requires a separate subscription from the rest of the ServiceNow AI Platform.

To purchase a subscription, contact your ServiceNow account manager. When you purchase a subscription, certain plugins are activated automatically. If a paid plugin isn't activated automatically, you can manually activate it from the All Applications list in your instance.

Note:

Before purchasing a subscription, you can evaluate the feature on a non-production instance without charge by requesting it from the Now Support Service Catalog.

Role required: admin

About this task

The following items are installed with Walk-Up for CSM:

- Plugins
- Store applications
- Roles
- Scheduled jobs
- Tables

For more information, see Walk-up Experience for CSM user roles.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Walk-Up for CSM plugin (com.snc.walkup_for_csm) using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

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Related topics

Walk-up Experience for Customer Service Management

Walk-up Experience for Customer Service Management

The ServiceNow® Walk-up Experience for Customer Service Management application enables you to set up a contact channel to support both online check-in and onsite check-in to a pre-established walk-up service center.

Walk-up Experience aims to support users and significantly improve their satisfaction through a fast in-person support. Employees and business guests can get real-time, in-person help with their issues.

User personas and roles are defined as follows:

Requesters

Users access the Walk-up Experience application in several ways.

- Online:
  - Quickly check in online to the nearest available walk-up venue using the **Walk-up Check In** option on the Service Portal using your computer.

    Note: Walk-up Experience application automatically routes you to the nearest walk-up queue using the IP address of your computer. You can change the location, if desired.

  - Join the queue and view your queue position.
  - Schedule appointments for support and receive appointment reminders, as well as cancel or reschedule appointments from links in the reminder or from the online check-in interface.
  - Schedule only one appointment per walk-up location queue at a time.

    Note: Even with a scheduled appointment, you can still check into a walk-up location queue online or in person onsite.

  - Receive email notifications when your request is assigned to a technician when your position in the queue is close to being served and when your walk-up request has been closed or abandoned, should you decide not to attend the queue.
- Onsite at the Walk-up Experience location:
  - Check into a queue at the physical walk-up location by manually entering your name, email, and contact details.
  - Observe queue activities on a large monitor that displays both walk-in requesters and those with appointments.
  - View the monitor displaying how many people are currently in the queue, guest positions in the queue, who is being served, and estimated wait times.
  - Answer an available single-question survey which captures your user sentiment after a visit.

Technicians or Agents

Customer support uses Walk-up Experience application to meet the demand of urgent issues or requests from the requesters.

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- Walk-up Experience technicians manage daily operations at the walk-up queue locations. They resolve customer service issues.
- Technicans can accept and close Walk-up Experience interactions through the Agent Workspace interface. Agent Workspace contains a personal inbox where walk-up interactions, if configured in Advanced Work Assignment, are automatically pushed for assignment.
- Agents can manage all aspects of Walk-up Experience fulfillment using Agent Workspace. Based on their capacity, and if records are on-hold, they can work on multiple transactions at the same time and promote interactions to cases.
- Technicians can view and accept scheduled appointments in their Agent Workspace personal inbox. Appointments are routed to the inbox according to agent availability. Alternatively, agents can pick and choose appointments manually.
- If necessary, technicians can work with anyone in the queue at any time. Technicians can manually assign themselves to a walk-up interaction, by accepting the interaction from a list of unassigned interactions in Agent Workspace.

Managers

Managers supervise the walk-up location technicians and oversee daily operations.

- Walk-up managers can observe and capture operational and performance data by monitoring the walk-up dashboard.
- Walk-up managers can use the application to increase customer satisfaction, provide customer service in a timely manner, and report performance data to upper management.

Administrators

Configure and maintain walk-up related systems, such as the walk-up location branding and text, queue locations and schedules, appointments, advanced work assignments, and notifications, and CSAT surveys.

Configuring Walk-up Experience for Customer Service Management

To get started with Walk-up Experience for Customer Service Management, see Configure Walk-up Experience for Customer Service Management.

Related topics

Walk-up Experience for CSM user roles

Walk-up Experience for guest users

The Walk-up Experience application can enable guest users to manage walk-up appointments online from the Consumer Service Portal or Customer Service Portal home page.

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.

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Requirements to use Walk-up Experience for guest users

Note the following requirements for guest users to be able to use Walk-up Experience:

- The Guest Walk-up Experience for Customer Service store app must be installed. For more information on installing the store application, see Install a ServiceNow Store application.
- The com.snc.walkup_for_csm plugin must be activated. For more information on activating a plugin, see Activate a plugin.
- The Walk-up Check-in widget must be configured. For more information, see Add a Walk-up Experience online check-in link on the Service Portal home page.

Domain separation and the CSM Walk-up Experience application

This section is an overview of domain separation as it pertains to the CSM Walk-up Experience application and how it relates to Service Portal pages, interaction queues, and configurations. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

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.

Overview

Domain separation in the CSM Walk-up Experience application is supported at the **Basic** level. However, the application depends on the Service Portal, which is not supported for domain separation. Domain separation pertains to the CSM Walk-up Experience application in the following ways:

- Walk-up location queues support domain separation to define which end users can access each location queue.
- The Interaction table supports standard domain separation for data security. Interaction tickets are opened for a specific domain.
- Walk-up location queues and interactions support domain separation. Therefore, fulfillers also work within a domain-separated environment when addressing interaction tickets associated with a location queue.
- Management and administration configurations reside in the walk-up location queue records. Therefore, those configurations are available to the respective domain managers and admins.
- While the Service Portal pages are not domain separated, the CSM Walk-up Experience application's portal pages retrieve data within the user's specific domain. Therefore, those pages can be reused across different service portals designed and configured for separate domains. The admins must build each portal themselves.

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- The **Domain** field is available on the wu_location_queue table. Setting domain here ensures users only see queues that are part of their domains during online check-in.
- For Advanced Work Assignment routing to operate, each wu_location_queue must include a work item routing condition. This condition explicitly adds a reference to the domain the queue is part of.

> **Note:** The appointment booking feature is not domain separated. Since Appointment [itil_appointment] table data is not domain separated, list views could reveal data across domains.

How domain separation works in the CSM Walk-up Experience application

For this application to be the most effective, walk-up administrators should configure walk-up locations accordingly. Configure the `wu_location_queue` record to meet a user need, which affects the requester experience. Each domain configured to the location queue record has its own set of rules. The same applies to other tables within the Walk-up application as well.

> **Note:** Elements of the Service Portal platform such as settings, portals, and widgets cannot be domain separated. However, the data within the widgets displays based on how the domain is configured. The recommended approach is to set up separate portals for each MSP customer.

Elements of the Service Portal that are used as part of the walk-up experience are as follows:

- Portal (Walk-up)
- Pages (`walkup_online_checkin, walkup_queue_on_site, walkup_home, walkup_survey, walkup_check_in`)
- Theme (Walk-up theme)
- Widgets (Online check-in experience, walk-up queue on site, walk-up check-in, walk-up exit survey, walk-up home, walk-up schedule)

To learn more, see Domain separation and Service Portal.

For data separation, the CSM Walk-up Experience application uses the walk-up user (Requester/ Walkup login user) domain to determine in which domain the requester data should be placed.

- Requesters can check in only in locations for which they have visibility.
- Requesters are able to select the Reasons that belong only to their own domain.
- Interaction records are created in the Requester's domain.

For the Fulfiller side, the application uses the domain of the walk-up user (walk-up technician/ manager/ admin) to determine which records are visible.

- By domain separation rules, Fulfillers can work only on interactions that are visible to them.
- Fulfillers are able to configure only walk-up location records that belong to their domain, are in the global domain, or have the parent-child hierarchy.
- The same visibility rules apply for the Many to Many `[wu_m2m_location_queue_reason]` tables that control the mapping between a location and reason.
- The walk-up context records also have domain separation support. This support ensures technicians to view detailed requester information only for the records that are visible by domain separation rules.

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Domain-separated tables

As part of the CSM Walk-up Experience, records in the following tables can be domain separated.

- Walk-up location queues `[wu_location_queue]`
- Walk-up reasons for visit `[wu_reason]`
- Walk-up reasons `[wu_m2m_location_queue_reason]`
- Walk-up contexts `[wu_context]`
- Interactions `[interaction]`

CSM Walk-up Experience portal security and access

Security is built into the application to help prevent end-user facing devices at the Walk-up Experience onsite portal from offering elevated role privileges to users. The Walk-up Experience onsite portal is accessed by an account containing only the sn_walkup.walkup_login role. The sn_walkup.walkup_login role contains the snc_external role.

Understanding Walk-up Experience portal security

Accessing the onsite Walk-up Experience portal requires the singularly assigned sn_walkup.walkup_login role. The user record with this role cannot contain any other roles. Because most user records contain multiple roles, the sn_walkup.walkup_login role is assigned to a user record account, not a human user. The security feature helps prevent the onsite portal check-in device from permitting users who might try accessing the portal with an elevated privilege role.

The sn_walkup.walkup_login role is granted to a user record for an account used to log in to the check-in device. Typically, the device at the onsite Walk-up Experience portal is a tablet. It is not an actual human being with an assigned role, but an account with a role. For example, a technician opening the onsite Walk-up portal for business logs in to the check-in device using the user record that contains the sn_walkup.walkup_login role. Again, the portal can only be accessed by a user record that contains this role only. A user cannot access the portal with the admin role or if the user record contains roles other than the sn_walkup.walkup_login role.

Access to Walk-up Experience

Technicians opening up the onsite Walk-up location for business, or joining the support team during operation hours, access the user record account. Technicians with sn_walkup.walkup_login role can log in to the Walk-up Experience portal. Internal and external users can access the onsite Walk-up Experience portal via a check-in device, typically a tablet, to enter a queue. Internal, authenticated users can also access an online queue check-in via desktop.

Configure the Walk-up Experience portal

Create engaging walk-up center service portals featuring your logo, portal theme, desired catalog, links to a knowledge base and social community, and more.

Before you begin

Role required: admin or sn_walkup.walkup_admin

Walk-up Experience includes a complete base-system **Walk-up Portal** with theme. The **Walk-up Portal** pages are meant to be used as built. You can create custom portal pages to meet your needs by copying the portal pages and associated widgets and making changes to the copies.

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You can configure both an online check-in portal and a physical check-in portal for your walk-up locations.

There are several ways to configure the Walk-up service portal:

- **Service Portal** application: Modular user interface framework for quick and easy building and customization of application portals.
- Service Portal Walk-up form: Requires CSS and HTML experience.

Procedure

1. To configure the Walk-up service portal using the **Service Portal** application, navigate to **Service Portal** > **Service Portal Configuration**.
   The Service Portal configuration page opens.
2. To customize the base-system walk-up portal with your unique branding, title, logo, theme colors, layout, properties, widgets, and more, or to create a new walk-up portal, refer to Service Portal for detailed information.
3. Alternatively, to configure the Walk-up service portal using the Service Portal Walk-up form, navigate to **CSM Walk-up Experience** > **Administration** > **Portal Configurations**.
   The Service Portals list opens.
4. In the Service Portals list, click Walk-up or search for it in the list header search box.
5. Click the Form menu icon and select **Configure** > **Form Design**.
   The form designer opens.
6. In the form designer header drop-down list select or search for any of the configurable walk-up forms to customize your portal appearance.

Option	Description
Walk-up context [wu_context]	Configure an online check-in channel for users to join a walk-up queue before physical ly arriving at the walk-up location. Identifies a walk-up user and the description of the asso ciated interaction.
Walk-up Location Queue [wu_location_queue]	Configure the physical walk-up location in teraction queue to manage and administer the service center. You can establish walk-up locations, set hours of operation, enable on line check-in, determine assignment groups, associate stockrooms, as well as design the queue time display and position notification system.
Walk-up Reason [wu_m2m_location_queue_reason]	Define various common reasons why a user needs walk-up support.
Walk-up Reason for Visit [wu_reason]	Specify the order in which reasons for a visit should be prioritized at a walk-up location.

To modify form content to meet your portal requirements, refer to Form configuration for detailed information.

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Configure Walk-up Experience service channel

Configure the Walk-up Experience service channel to meet the needs of your walk-up agents. You can configure the way the tasks are assigned and manage interactions in the Agent Workspace.

Before you begin

Role required: sn_csm_walkup.walkup_admin

About this task

The Walk-up Experience service channel is viewed and configured through Advanced Work Assignment. You can modify default values and conditions as required.

Procedure

1. Navigate to **All** > **Advanced Work Assignment** > **Service Channels**.
   The Service Channels list displays.
2. Select **Walk-up** to open the Walk-up Experience service channel.
3. Refer to Create or configure a service channel for detailed information regarding the Service Channel Walk-up form values and conditions.
   For more information regarding Advanced Work Assignment service channels configuring capacity and utilization, inbox layout, and overriding agent capacity for selected agents, see Service channels.

Configure Walk-up Experience notifications

As an administrator, you can create and use notifications to notify requesters about events that impact them while they're getting their issue addressed through a walk-up experience. Requesters are notified of online appointments that they've taken or when their issue is assigned to a store representative by email.

Before you begin

Role required: sn_csm_walkup.walkup_admin

About this task

Walk-up Experience includes several base system notifications that you can use or customize to notify walk-up visitors about specific information and interactions.

Walk-up Experience notifications

Notification	Description
Walk-up Abandoned	Notifies when a walk-up interaction is closed.
Walk-up Threshold Notification	Notifies visitors when they're close to being next in line for support.
Walk-up Assigned	Notifies when an interaction is assigned to a technician.
Walk-up Closed	Notifies when an interaction is closed.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Notifications**.
2. Select an available walk-up notification to view basic properties, as well as information about when to send it, who receives it, and what the notification contains.
3. To modify a walk-up notification, edit any of the form fields.

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4. To create a walk-up email or push notification, select **New**.
   For more information, refer to the following topics:
   - Create an email notification
   - Create a push message
   For complete information regarding using the System Notification application, refer to Notifications.

Configure Walk-up Experience schedules

Once you know the hours of operation for your Walk-up Experience location, you can either access the base system default schedules or create schedules to associate with your walk-up location.

Before you begin

Role required: sn_csm_walkup.walkup_admin

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Schedules**.
   The Schedules list opens. You can view all available base-system default schedules, such as **8-5 weekdays excluding holidays**.
2. To modify an existing base system schedule, select the schedule name, otherwise select New to create a schedule if none of the default schedules apply for your walk-up location.
3. Complete the Schedule New record form or modify fields on an existing form.

   To complete this process and for detailed information on creating, modifying, and using schedules in the system, including a definition of all form fields, refer to Schedules.

Walk-up Experience appointment booking

With the CSM Walk-up Experience appointment booking feature, walk-up users can view available appointment windows. The users can also select and book an appointment for a walk-up location using the online **Walk-up Check-in** feature.

Create time windows for walk-up queue locations enabling requesters to book service appointments.

The Appointment Booking plugin (com.snc.appointment_booking) must be activated to use the application. Appointment booking adds the Appointment Booking menu to the application navigator and the following modules:

- **Appointment Booking Configuration**: Use this module to create an appointment booking. Configure an application and then configure each service within that application.
- **Appointment Bookings**: Use this module to view a list of appointments that have been booked for services. This list includes the work orders associated with each appointment.

Appointment booking requires configuration at both the application level, in this case, Walk-up Experience, and at the walk-up queue service level, represented by the actual location of the walk-up queue.

The Walk-up Experience application configuration contains settings that apply to all the service locations within the application that support appointment booking.

A service configuration is required for each of the walk-up queue locations within the application that offer scheduled appointments. A service configuration includes settings that apply only to that specific walk-up queue service location.

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Note: Both the application configuration and the service configuration must be active to book appointments.

For detailed information about the **Appointment Booking** application, see Managing appointments.

Configure appointment booking

Create or modify appointment booking configurations for Walk-up Experience services. A service is defined as the actual physical location of a walk-up queue. The information stored in the Walk-up Experience application configuration applies to all services or queue locations within the application.

Before you begin

Role required: sn_csm_walkup.walkup_admin

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Appointment Configurations**.
2. Click **New** to create a new service configuration.
   Alternatively, you can click an existing service configuration to modify data.
3. In the Appointment Booking Service Configuration form, fill in the following fields as needed.

Appointment Booking Service Configuration form

Field	Description
Name	The name of the service configuration.
Active	Activates appointment booking for the service. **Note:** If deactivated, customers cannot schedule appointments for the service but can still create work orders.
General Information	
Configuration	The name of the appointment booking configuration to which this service belongs.
Availability table	The table calculates appointment availability. For Walk-up Experience, choose Walk-up Appointment [wu_appointment].
Holiday Schedule	The holiday schedule to use when determining availability. Appointment booking evaluates the holiday schedule when determining the number of available appointments and excludes any day in the schedule that is set to **Exclude**. Click the lookup icon and select a schedule from the Schedules list. **Note:** Holiday schedules are useful when you set the assignment method for tasks to **manually**, which does not consider agent schedules.
Catalog Information	
Catalog item	The service in the service catalog for which you are creating this appointment booking configuration. Click the lookup icon and select the associated service from the Record Producers list. You must create a record producer for each walk-up service location.

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Field	Description
	Note: The catalog item must exist in the service catalog. If you are using appointment booking with work orders, create a work order template before you configure appointment booking.
Location	The field on the record provider that determines the appointment location. **Note:** Ensure the **Location** field on both this form and the Walk-up Location Queue (wu_location_queue) form are configured in alignment. Walk-up Experience contains the *location* reference variable, which is a Location (cmn_location) record. Selecting **Location** from the search list icon ensures you are aligning with the same time zone as the walk-up location you are configuring for. When you select **Location**, the online appointment scheduling calendar displays in the user time zone. If you leave this field empty or if you have not configured the user preference for the instance to have an associated time zone, the appointment scheduling calendar defaults to display in the user time zone. If a user in Europe has User preferences for **Time zone** configured for **Europe/Brussels** and the Appointment Booking Configuration for the **Location** field is set to a cmn_location with the time zone **US/Pacific**, then the appointment scheduling calendar displays in the US/Pacific time zone. When a user creates an appointment, the system defaults to use the schedule associated with the Walk-up Location Queue (wu_location_queue), regardless of the **Location** field value of this record producer.
Appointment is mandatory	Enable this check box if it is required for a customer to create an appointment when requesting this service. ○ If enabled, the **Appointment** field appears on the record producer and the user must select an available appointment before submitting the service request. ○ If disabled, the user can submit the service request without selecting an appointment.
User contact	The field on the record producer that determines for whom the appointment was created. Set this field to **Contact**. This is a reference field that looks for a sys_user variable on the record producer.
Booking	
Appointments per window	The number of available appointments for each configured appointment time slot. This number determines the number of available appointments displayed on the Select Appointment window. Enter a number in this field if the assignment method for tasks is set to **manually**. If set to either **using auto-assignment** or **using dynamic scheduling**, this setting does not apply, unless a location is not provided. Then the configuration defaults to the number of appointments per window.
Lead time	The number of hours or days from the current time after which you have booked an appointment for this service. Define the lead time in hours or days. The default is 4 hours.

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Field	Description
Future bookable max days	The number of days after the current day for which an appointment can be booked for this service. The default is 14 days.
Reschedule / Cancel by time	The number of hours or days prior to an appointment start time that are required for cancelling an appointment or rescheduled. If a user attempts to cancel or reschedule an appointment within this number of hours, the **Cancel** button is not available. Define the time in hours or days. The default is 4 hours.
Appointments	
Appointment window	The length or duration of the appointment window. **Note:** Allow enough time to start and complete the work within this window.
Work duration	The amount of time required to complete all tasks created by the record producer. You set the duration for a task when it is created which is used to determine availability. The default is 1 hour.
Travel duration (round trip)	An estimated value of the average travel time required (round trip) for the agent performing the task. Set the value to 0 since the work is performed onsite and travel time is not needed.
Daily Schedule	
Bookable days	The days of the week for which appointments can be booked. The default is Monday through Friday. Bookable days should reflect the appointment schedule. **Note:** Appointment schedules are separate from the walk-up queue location schedule but should be the same days and hours as the walk-up queue location schedule.
Daily start time	The start of the work day and the earliest start time for an appointment window. The default is 9:00.
Daily end time	The end of the work day and the latest end time for an appointment window. The default is 18:00 PM.
Include daily break	Enable this check box to schedule a break for each bookable day, then select the break start and end times. Can define one break which applies to all days.
Appointment booking preview	Provides a preview of the appointment windows and times based on the selected start and end times, break time, and appointment window.

4. Click **Submit**.

Walk-up Experience appointment booking administration

Create or modify and enable the CSM Walk-up Experience application configuration and the individual service location configurations for the **Appointment Booking** feature.

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Administrators can create, modify, and enable the Walk-up Experience application configuration. Appointment booking administrators (appointment_booking_admin) can create, modify, and enable configurations for service locations within the Walk-up Experience application.

Walk-up Experience is an application level configuration provided with the base system appointment booking feature. You can include as many service level configurations as needed. The service level configurations apply to the individual walk-up queue locations that exist. Administrators can modify these configurations as needed or use them as examples to create new configurations.

For detailed information on appointment booking administration, refer to Configure appointment booking.

Enable Walk-up Experience appointment-booking

Enable or disable the appointment booking feature for Walk-up Experience as well as for the individual walk-up service locations available to customers.

Before you begin

Role required: sn_csm_walkup.walkup_admin

About this task

The Appointment Booking plugin (com.snc.appointment_booking) must be activated to use the application.

When you enable appointment booking, the **Schedule an appointment** tab appears on the online check-in page. Users choose a reason for the appointment and select a date a time from the available appointments.

Procedure

1. Navigate to **All** > **Appointment Booking** > **Appointment Booking Configuration**.
2. Click **Walk-up Experience**.
   The **Walk-up Experience** configuration is provided with the base system **Appointment Booking** feature.
3. Click **Active** to enable appointment booking for the Walk-up Experience application.
   Alternatively, if the feature is active you can deactivate it by clicking **Active**.
4. In the Appointment Booking Service Configuration related list, click the name of a service.
   For Walk-up Experience, the physical location of a walk-up queue defines a service. Every walk-up queue associated with your application is a service that you must configure for appointment booking.
   The Appointment Booking Service Configuration form for the selected service opens.
5. Click **Active** to set the field to true.
6. Click **Update**.

Walk-up Experience appointment booking configuration

Create or modify appointment booking configurations for the Walk-up Experience. You can view or modify the Walk-up Experience application appointment booking configuration and create or modify related service appointment configurations.

The base system Walk-up Experience application includes a default appointment booking configuration that can be modified. By default, the information stored in the Walk-up Experience application appointment booking configuration applies to all services within that application. Services within the Walk-up Experience application are defined as the actual walk-up queue locations. You can create new appointment booking service configurations for the Walk-up Experience application or modify existing configurations.

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For example, you may want to configure one walk-up queue to accept appointment booking every day from Monday to Friday, but for another queue, you only want appointment booking available on Monday, Wednesday, and Friday. By configuring appointment booking at the service level, you can achieve this goal.

Specific Walk-up Experience set-up criteria for appointment booking include the following configurations:

- Define different appointment schedules and time windows per queue location.
- Define the time window in which you want to support appointments. For example, 15 minutes v. 30 minutes.
- Define the time window capacity. For example, the maximum number of appointments per time window.

View or modify a Walk-up Experience appointment booking configuration

View the base system default appointment booking configuration to determine if the criteria meets your walk-up appointment booking requirement. You can modify the configuration to manage appointment booking. The information stored in the Walk-up Experience appointment booking configuration applies to all the services within the application.

Before you begin

Role required: sn_csm_walkup.walkup_admin

About this task

The **Walk-up Experience** configuration is provided with the **Appointment Booking** feature.

Procedure

1. Navigate to **All** > **Appointment Booking** > **Appointment Configurations**.
2. To view the **Walk-up Experience** configuration, click the configuration name.
3. In the Appointment Booking Configuration form, view or modify the following fields as needed.

Appointment booking application configuration fields

Field	Description
Name	The name of the application configuration.
Task Table	Appointments are created for the tasks in the selected table. The Walk-up Appointment [wu_appointment] table is the default table for the **Walk-up Experience** configuration.
Availability Method	Use one of two methods to determine appointment availability. ○ **Number of appointments per slot**: Define a specific number of appointments per time slot. Use this method if the task assignment is set to **manually** which is the default setting. ○ **Scripted**: Use this configuration setting to determine availability if the task assignment method is set to **using auto assignment** or **dynamic scheduling**.
Active	Activates the application configuration and enables appointment booking.
Auto acceptance	If the application configuration setting for **Process lifecycle** is set to **task-driven**, an agent must accept or reject an assigned task. Enable the **Auto acceptance** check box to override this configuration setting for appointment booking.

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Field	Description
Portal View	Display available appointments for a single day or for a week on the online **Self Service Walk-up Check-in** portal or from the **Service Portal**.

4. Click **Submit**.

Create a Walk-up Experience appointment booking configuration for a service

Create or modify appointment booking configurations for Walk-up Experience services. A service is defined as the actual physical location of a walk-up queue. The information stored in the Walk-up Experience application configuration applies to all services,or queue locations, within the application.

Before you begin

Role required: sn_apptmnt_booking.appointment_booking_admin

About this task

To use the appointment booking feature, administrators must create a configuration for each service, or queue location, that is available to walk-up customers. Service configurations are created within the **Walk-up Experience** application configuration, as part of the **Appointment Booking** application.

Procedure

1. Navigate to **All** > **Appointment Booking** > **Appointment Booking Configuration**.
2. Click **Walk-up Experience**.
3. In the Appointment Booking Service Configuration related list, click **New** to create a new service configuration.
   Alternatively, you can click an existing service configuration to modify data.
4. In the Appointment Booking Service Configuration form, fill in the following fields as needed.

Appointment booking service configuration fields

Field	Description
Active	Activates appointment booking for the service. **Note:** If deactivated, customers cannot schedule appointments for the service but can still create work orders.
General Information	
Name	The name of the service configuration.
Configuration	The name of the appointment booking configuration to which this service belongs.
Availability table	The table that is used to calculate appointment availability. For Walk-up Experience, choose Walk-up Appointment [wu_appointment].
Holiday Schedule	The holiday schedule to use when determining availability. Appointment booking evaluates the holiday schedule when determining the number of available appointments and excludes any day in the schedule that is set to **Exclude**. Click the lookup icon and select a schedule from the Schedules list.

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Field	Description
	Note: Holiday schedules are useful when the assignment method for tasks is set to **manually**, which does not consider agent schedules.
Catalog Information	
Catalog Item	The service in the service catalog for which this appointment booking configuration is being created. Click the lookup icon and select a service from the Record Producers list. **Note:** The catalog item must exist in the service catalog. If you are using appointment booking with work orders, create a work order template before you configure appointment booking.
Location	The field on the record provider that determines the appointment location.
Appointment is mandatory	Enable this check box if it is mandatory that a customer create an appointment when requesting this service. ○ If enabled, the **Appointment** field appears on the record producer and the user must select an available appointment on the Select Appointment window before submitting the service request. ○ If disabled, the user can submit the service request without selecting an appointment.
User contact	The field on the record provider that determines who the appointment is being created for. This is a reference field that looks for a sys_user variable on the record producer, for example, **Contact**.
Timezone	The appointment window based on the **Timezone** field specified in the user contact record or the location where the appointment for the task is scheduled.
Booking	
Appointments per window	The number of available appointments for each configured appointment time slot. This number determines the number of available appointments that are displayed on the Select Appointment window. Enter a number in this field if the assignment method for tasks is set to **manually**. If set to either **using auto-assignment** or **using dynamic scheduling**, this setting does not apply, unless a location is not provided. Then the configuration defaults to the number of appointments per window.
Lead time	The number of hours or days from the current time after which an appointment can be booked for this service. Define the lead time in hours or days. The default is 4 hours.
Future bookable max days	The number of days in advance of the current day for which an appointment can be booked for this service. The default is 14 days.
Reschedule / Cancel by time	The number of hours or days prior to an appointment start time that are required for an appointment to be canceled or rescheduled. If a user attempts to cancel or reschedule an appointment within this number of hours, the **Cancel** button is not available. Define the time in hours or days. The default is 4 hours.

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Field	Description
Appointments	
Appointment window	The length or duration of the appointment window. **Note:** Allow enough time for the work to be started and completed within this window.
Work duration	The amount of time required to complete all tasks created by the record producer. This duration is set for a task when it is created. Used to determine availability. The default is 1 hour.
Travel duration (round trip)	An estimated value of the average travel time required (round trip) for the agent performing the task. Set the value to 0 since the work is performed onsite and travel time is not needed.
Daily Schedule	
Bookable days	The days of the week for which appointments can be booked. The default is Monday through Friday. Bookable days should reflect the appointment schedule. **Note:** Appointment schedules are separate from the walk-up queue location schedule but should be the same days and hours as the walk-up queue location schedule.
Daily start time	The start of the work day and the earliest start time for an appointment window. The default is 9:00.
Daily end time	The end of the work day and the latest end time for an appointment window. The default is 18:00 PM.
Include daily break	Enable this check box to schedule a break for each bookable day, then select the break start and end times. Can define one break which applies to all days.
Appointment booking preview	Provides a preview of the appointment windows and times based on the selected start and end times, break time, and appointment window.

5. Click **Submit**.

Configure daily schedules for Walk-up Experience service appointment booking

Specify different daily hours of operation for your Walk-up Experience location appointment booking.

Before you begin

Role required: sn_apptmnt_booking.appointment_booking_admin

About this task

Create a unique appointment booking schedule for each day of the week or for specific days of the week. For example, you can set the appointment booking availability schedule to run all day, from 9:00am to 5:00pm, Monday, Wednesday, and Friday. Tuesday and Thursday appointment availability schedule can run from 9:00am to 12:00pm. You can completely remove appointment booking for a specific day of the week, for example, Friday.

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Note: To specify unique daily booking schedules, while using your associated appointment booking configuration, create Schedule Entries to exclude the hours appointment booking is not available.

Procedure

1. To configure, for example, Tuesday and Thursday appointment availability schedule from 9:00am to 12:00pm, navigate to **Walk-up Experience** > **Schedules**.
2. Select the schedule you use, for example, the **8-5 weekdays excluding holidays** schedule.
3. In the Schedule Entries related list, select **New** to display the Schedule Entry New record form.
4. Name the new record **Excludes** and fill in the form to create a unique daily booking schedule for Tuesday and Thursday appointments.

Schedule Entry Excludes configuration fields

Field	Description
Name	Name the record. For example, name the record **Excludes** to indicate the hours excluded from appointment booking.
Type	Choose **Excluded** as the type.
Show as	Choose **Busy** as the reason for the exclusion.
When	Indicate the date to begin using this booking availability schedule. Also indicate the time to exclude booking availability for this date. For example, the hours of 12:00pm through 5:00pm.
Repeats	Indicate the recurrence for this availability schedule. For example, **Weekly on Tue and Thu**.
Repeat until	Specify how long you want this availability schedule to run by selecting an end date.

5. Select **Submit**.
6. To verify that Tuesday and Thursday appointment booking is only available from 9:00am to 12:00am, navigate to your online Walk-up Check-in application.
   If configured for view, You can access the online Walk-up Check-in application from the **Service Portal Home** page or under **Self-Service** in the left navigation bar.
7. Select the walk-up location for which you are verifying the schedule.
8. Select **Schedule an appointment** and select a reason for the visit.
9. Select a date for the appointment.
   The **Select Appointment** window displays the first available appointment, by week and day.
10. Determine that appointments are only available on Tuesdays and Thursdays from 9:00am to 12:00pm.

Activate and configure appointment booking reminders for Walk-up Experience

Configure scheduled appointment reminders for Walk-up Experience users. Reminders ensure that users attend appointments in a timely manner, and if they can't attend then reschedule or cancel an appointment.

Before you begin

Role required: sn_csm_walkup.walkup_admin

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About this task

For using appointment booking reminders, you must activate the **Appointment Booking Reminders** Scheduled Job, which is not active by default. In addition, the **Appointment reminder** field doesn't appear on the **Appointment Booking Service Configuration** form by default. You must add it to the form and configure reminders. Reminders are inactive unless a configuration is set.

Procedure

1. To activate the **Appointment Booking Reminders** Scheduled Job, navigate to **System Definition** > **Scheduled Jobs**.
2. Search for **Appointment Booking Reminders** by name and click to open.
3. Select the **Active** field to activate the scheduled job.
4. Select **Update**.
5. To add the **Appointment reminder** field to the **Appointment Booking Service Configuration** form, navigate to **Walk-up Experience** > **Administration** > **Appointment Configurations**.
6. Select a Walk-up Experience service configuration from the list.
   The system opens an **Appointment Booking Service Configuration** form.
7. Select the menu button and then select **Configure** > **Form Layout**.
8. Select **Appointment reminder** from the **Available** list and move it to the **Selected** list using the add button.
9. Select **Save**.
   The **Appointment Booking Service Configuration** form displays with the **Appointment reminder** field.
10. To configure an appointment reminder, choose an amount of time, in hours, from the **Appointment reminder** field drop-down list.
    The hour/hours you choose represents the amount of time before a scheduled appointment that you want to send a reminder for. For example, two hours before a scheduled appointment.
11. Select **Update** to add the appointment reminder configuration.

Configure Walk-up Experience locations

Administrators define walk-up locations while setting up the walk-up experience for an organization. Requesters see this information when they schedule appointments or check in at a service location.

Before you begin

Role required: sn_csm_walkup.walkup_admin

About this task

Administrators can configure the following for locations:

- Create or modify walk-up location queues or mark locations as inactive.
- Allocate schedules for appointments, AWA conditions.
- Set conditions to automatically route work items.
- Location unavailable temporarily.
- Location address and picture.
- Specify reasons-for-visit options.
- Configure how interactions display for each walk-up location.

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Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Walk-up Locations**.
2. Select **New**.
3. Complete the form.

Fields	Description
Name	Provide a detailed name for the location, such as the city or building.
Description	Provide a description of the location, if de sired.
Schedule	Select a schedule for operation days and hours.
Appointment Booking	Add and configure an appointment booking schedule for the walk-up location.
Service Channel	Search for and choose the **Walk-up** service channel.
Define condition here	Select whether to route work items to this queue automatically using a condition.
Condition mode	Choose either **Simple** mode or **Advanced** mode to route work to the queue automati cally. Simple mode is the default. With sim ple mode, you can select from prebuilt con ditions. For example, select **Location is X** [search and select location]. With advanced mode, you can provide your own scripting and code.
Work item routing condition	Configure and specify who would provide cus tomer support at a walk-up location. Location is determined by physical address.
Active	Check to make this queue location active.
Enable away state	Check to allow an away state.
Away message	Specify a display message for when the lo cation is temporarily closed. Specify this for hours other than the scheduled closed times.
Stockroom	Select a stockroom to supply assets for the lo cation.
Location	Select the physical address of your location.
Location image	Click to add an image of your location. For ex ample, the image of the city or building where the walk-up location is located. Image types include .gif, .jpg/.jpeg, or .png. For more information, see Image field type.

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Fields	Description
Access Type	Select external or both types of users so that the appropriate walk-up locations are visible to users.

4. Select the **Management** tab to complete the Management form section.

Fields	Description
Position notification	Select the queue position that triggers a notification to visitors when they're close to being assisted at the location. For example, when a visitor is third in line to be assisted.
Last check-in	Specify the last available check-in time in minutes. For example, 30 minutes before closing.
Enable online check-in	Allow visitors to check in to the location remotely from a laptop or mobile phone.
Enable appointment delegation	Enable users to book an appointment for someone or else. **Note:** When you enable appointment delegation, the **Appointment delegation group** field appears. Select a group to allow appointment delegation. Add a new group of users if an appropriate group doesn't exist. Only users in this group would have the choice of scheduling for themselves or another user when they book an appointment.
Name configuration	Select a name configuration to display visitor information on the onsite queue TV monitor and online check-in screen. The first name displays. However, you can show first and last name, first name with last name initial only, or first name only.
Appointment routing time	Specify the amount of time, in minutes, to route the work item to an agent prior to an appointment time.
Hold time	Enter an amount of time, in minutes, that you want to put an interaction on hold before attempting to route it again to a technician. For example, entering 5 would put the interaction on hold for five minutes before rerouting.
Show estimated wait time	Enable the estimated wait time to show for walk-up queues.

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Fields	Description
	Note: The wait time is calculated from the average wait time of the queue and how many users are currently in the queue. All estimated wait times are rounded to the nearest whole minute. The estimated wait time calculation re quires the use of Service Owner Work space to calculate the average wait time. Service Owner Workspace uses the Ad vanced Work Assignment queueing sys tem to obtain the average wait time. Estimated wait times are displayed in the following places: ○ Online check-in. ○ Onsite check-in and onsite queue screen (TV). ○ **Status** widget on the Service Portal
Audio Playback	Specify when the audio confirmation plays, for example, when a requester checks into an onsite queue, when a requester checks in on line, or both. The default mode is **None**.
Audio File	Specify an audio file to play when a requester checks into a queue. The base system default file is walkup_checkin.mp3. **Note:** Only mp3 file formats are sup ported across all browsers. You may have to provide additional browser permissions to use an audio file on the Safari browser.

5. Select the **Administration** tab to complete the administration section of the form.

Queue time display	Choose from **None**, **Check-in time**, or **Time waited** to be displayed on the location wall monitor.
Queue message	Specify a welcome message for your location wall monitor.
Check-in greeting	Create a check-in message to guide visitors to sign into the queue at the designated check-in monitor.
Closed message	Create a message to alert visitors that it is out side the hours of operation and the location is closed.

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Closed phone number	Select your country from the drop-down menu to display the Customer Support phone number.
Closed record producer	Search for and select a record producer to dis play and link to during closed hours, such as **Create incident**.
Closed image	Click to add an image indicating the walk-up location is closed. The image displays on the wall monitor to alert walk-in visitors that the lo cation is closed.
Max search results	Specify how many search results to provide for contextual searches.
Contextual search config	Configure which search context would pro vide results at the location.
Appointment type	Option to set the type of appointment the re questers can book for the location. The follow ing options are available. ○ In-person ○ Remote ○ Both **Note:** This field is not a default field. You can configure the form layout to add this field.
Enable unregistered user entry	Check to allow users who don't have a user name in the system to check in to the location for support. For example, guests visiting the location (opposed to employees).
Enable lookup user entry	Check so users can see and select their names from a list as they begin typing their names.
Enable technician info	Check to allow the display of available techni cian names on the location wall monitor.
Enable technician avatar	Check to allow the display of technician avatars on the location wall monitor.
Header logo	Click to add a header logo. The header logo is location-specific. If no logo is specified, by de fault, the Walk-up Portal logo is used.
Queue logo	Click to add a logo for the designated walk-up location wall monitor. Design this logo to work correctly with a black background. If no logo is specified for the queue, by default, the Header logo is used. If no Header logo is spec ified, the Walk-up Portal logo is used.

6. Right-click in the form header and select **Save**.
   Several tabs appear.

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- **Interactions**
- **Walk-up Appointments**
- **Reasons for Visit**
- **Assignment Eligibility**
- **Work Item Sort Order**

7. Click the **Interactions** tab to view interactions or configure how the walk-up Interactions list should display.
8. Click the **Walk-up Appointments** tab to view appointments or configure how the Walk-up Appointments list should display.
9. Click the **Reasons for Visit** tab to view, modify, or create a reason for visit option.
   The base system includes three active reasons:
   - **I need something**
   - **Something is not working**
   - **Laptop refresh**
   - **Other**
10. Click the **Assignment Eligibility** tab to view, modify, or create an assignment rule for your walk-up queue locations.
    Assignment rules are configured in the Advanced Work Assignment product.
11. Click the **Work Item Sort Order** tab to view, modify, or create a Work Item Sort Orders for your walk-up queue locations.
12. Click **Update** to save the new or modified location queue.

Configure Walk-up Experience locations for guest users

Configure walk-up locations for guest-users so they can select a location while making appointments.

Before you begin

Role required: sn_csm_walkup.walkup_admin, catalog_admin

Note: `catalog_admin` is a high#privilege role which grants broader permissions. Assign this role only after reviewing the permissions and confirming necessity.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Administration** > **Appointment Configurations**.
2. Select a location that the guest user needs access to.
3. Click the Preview this record icon (ⓘ) next to the **Catalog item** field.
4. In the Record Producer window, click **Open Record**.
5. Under Related Links, click the Available For tab.
6. Click **Edit**.
7. Move **Any Guest User** from the **Collection** list to the **Available For** list and click **Save**.
8. Under **Related Links**, click the Variable Sets tab.
9. Select *`sn_appointment_variable_set`* and set permissions for each of its variables.

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a. In the notice at the top of the form about the current application, click **here** to access the CSM Walkup Experience application record.

b. Select the **sn_appointment** variable.

c. Click the Permission tab.

d. For the **Read roles** and **Write roles**, move the public, snc_internal, and snc_external roles from the **Available** list to the **Selected** list.

> **Note:** **Create roles** is also required for the correct auto-population of the information in the guest records.

e. Click **Done**.

f. Repeat these actions for the **sn_appointment_macro** variable.

10. Repeat step 9 to set permissions for the *sn_walkup_variable_set* variable set.

Result

The configured walk-up locations are now available for guest users.

Remove a Walk-up Experience location

If you permanently close down a physical Walk-up Experience location, you can also remove the location from the Walk-up Location Queues table.

Before you begin

Role required: sn_csm_walkup.walkup_admin

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > > **Administration** > **Walk-up Locations**.
2. Click the name of the walk-up location you want to remove to open the location queue record.
3. Click **Delete** in the form header.
   A confirmation pop-up appears ensuring you want to delete the record.
4. Click **Delete**.
   The Walk-up Experience location queue is removed from the application.

CSM Walk-up Experience customer satisfaction surveys

With Walk-up Experience surveys, you can rate your satisfaction with walk-up location interactions, providing management with feedback to improve the walk-up experience.

The Walk-up Experience application includes two base-system predefined surveys.

Walk-up CSAT survey

An on-site, one-click sentiment analysis survey where you can quickly rate service based on a 1–3 scale, where 1 is a negative experience and 3 is a positive experience. The survey uses images of three faces to represent the different sentiments: sad, neutral, and smiling.

Walk-up experience satisfaction survey

Access this survey from a link enclosed in an email. The link is sent when walk-up interactions are closed. This survey uses sentiment analysis for the

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overall experience, wait-time experience, technician experience, technician professionalism, and additional comments. This survey is based on a 1–5 numeric rating scale, where 1 is very unsatisfied and 5 is very satisfied.

Walk-up administrators and managers can modify these surveys and the associated trigger conditions. Managers and administrators can review responses by question and see a scorecard for each survey on the **Walk-up Experience Dashboard** module. User comments provide feedback that is used to improve the performance of walk-up interactions.

For more detailed information about working with surveys, sentiment analysis, trigger conditions, and survey questions, see Assessments and Surveys.

Configure Walk-up Experience surveys

Define surveys so that requesters can provide feedback on their satisfaction with the service quality received at a location.

Before you begin

Role required: sn_csm_walkup.walkup_admin

About this task

Creating a customer satisfaction survey requires that you first define a new survey and then use the Survey Designer to design, configure, and make it available to users.

Procedure

1. To view and use a base system predefined survey in the Walk-up Experience application, navigate to **CSM Walk-up Experience** > **Administration** > **Surveys**.
   The Assessment Metric Types list opens displaying the available walk-up surveys.
2. To modify an existing walk-up survey, select the survey name, otherwise navigate to **Survey** > **View Surveys** and select **New** to define a new survey if none of the base system surveys are optimal for your walk-up location.
3. To modify or complete the form, refer to modify a survey definition.

System properties for configuring Walk-up Experience for guest users

System properties enable you to configure the Walk-up Experience for guest users so they can access the Walk-up Check-in widget from the Service Portal Home Page and schedule appointments online.

Properties to configure Walk-up Experience application

As an admin, in your instance, enter `sys_properties.list` in the filter navigator and add the following properties. The default values are listed in the following table.

Walk-up Experience properties

Property	Default Value	Description
sn_guest_walkup_cs.guest_user_walkup_enabled (true/false)	true	Enables or disables Walk-up Experience for guest user.
sn_guest_walkup_cs.captcha.enabled (true/false)	true	Enables or disables the CAPTCHA validation from the welcome page.
sn_guest_walkup_cs.max_confirmations_validity_in_minutes (integer)	15	Time frame to confirm the appointment booking.

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Walk-up Experience properties (continued)

Property	Default Value	Description
sn_guest_walkup_cs.max_otp_validity (integer)	5	The time that the one-time password the user receives to modify or cancel the appointment is valid.
sn_guest_walkup_cs.max_guest_appointments_per_location	0	The number of appointments the guest user can book per location.
sn_guest_walkup_cs.captcha.timeout	10 mins	The time after which the CAPTCHA vaidation on the welcome page times out.

Add a Walk-up Experience online check-in link on the Service Portal home page

Configure a Walk-up Experience link to enable guest users to check in online to a walk-up location via Service Portal.

Before you begin

Role required: sp_admin

Service Portal for Enterprise Service Management (com.glide.service-portal.esm) and Walk-up for CSM (com.snc.walkup_for_csm) plugins must be activated.

Procedure

1. Navigate to **All** > **Service Portal** > **Pages**.
2. Select **ID** from the **Search** drop-down list and enter `csm_index` in the **Search** field.
3. Select **csm_index** to display the Customer Service Portal page.
4. Scroll down and select the **Open in Designer** related link.
5. Select the **Walk-up Check-In** widget from the **Widgets** list in the left pane and drag it to the desired location on the Customer Service Portal page where you want the link to appear.

Related topics

System properties for configuring Walk-up Experience for guest users

Configure Conversational Appointment Booking

Install and set up the Conversational Appointment Booking application to enable customers to book, reschedule, or cancel an appointment with a Virtual Agent.

Before you begin

Role required: va_admin

Important: Conversational Appointment Booking is currently supported on the Portal only.

About this task

This procedure provides general steps to set up the Conversational Appointment Booking application so that your customers can book appointments on your ServiceNow instance with a Virtual Agent.

Note: A Now Assist for CSM license must be active on your instance.

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Procedure

1. Install the Conversational Appointment Booking application.
   For more information, see Install Conversational Appointment Booking.
2. Navigate to **Virtual Agent** > **Designer**.
3. Publish the following topics:
   - Walk-up Appointment Scheduling - LLM
   - Reschedule a Walk-up Appointment
   - Cancel a Walk-up Appointment

   For more information, see Publish a Virtual Agent topic.

   These topics are read-only by default. To add custom controls.

   duplicate the topics.

   Note: Translation for custom controls is currently unavailable. You can manually add the translation in the ServiceNow® Walk-up Experience appointment booking application. See Walk-up Experience appointment booking configuration for more information.

4. Confirm that the **Appointment Booking** custom control is published.
5. Confirm that the **Book or Update Appointment** and **Get Walk-up Location** topic blocks are published.
6. Test the topics.
   See Test Virtual Agent topics for more information.

Conversational Appointment Booking

Book, reschedule, and cancel appointments from Virtual Agent conversations. The ServiceNow® Conversational Appointment Booking application uses Now Assist to communicate with customers.

Note: A Now Assist for CSM license must be active on your instance.

Booking an appointment

Important: Conversational Appointment Booking is currently supported on the Portal only.

The appointment booking flow works as follows:

- The logged-in user contacts your business via your portal.
- The user enters the appointment booking request into the chat, and the Virtual Agent uses Now Assist to understand the request.
- The Virtual Agent asks the user to share their location. If the user shares their location, the available appointment locations are displayed.
- The user chooses a location.
- The user chooses the purpose of the appointment.
- The user chooses a date and time slot for the appointment.
- The appointment booking is complete.

The following image illustrates the appointment booking flow.

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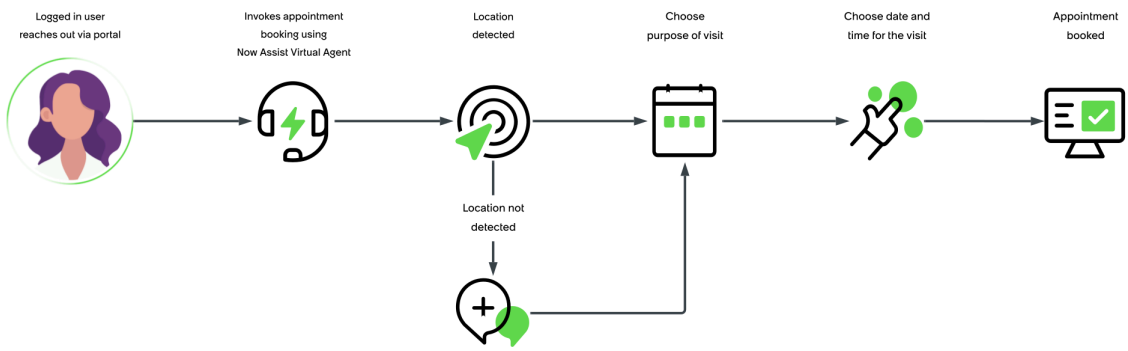
Booking an appointment



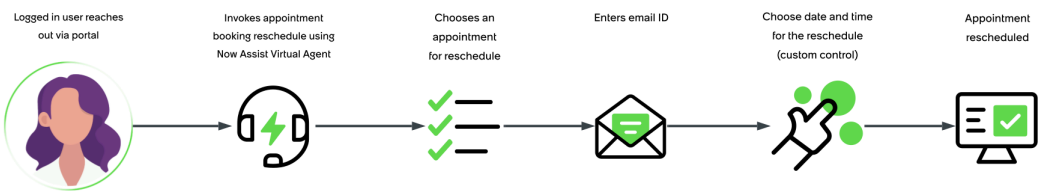
Rescheduling an appointment

The appointment rescheduling flow works as follows:

- The logged-in user contacts your business via your portal.
- The user enters the appointment booking request into the chat, and the Virtual Agent uses Now Assist to understand the request.
- The user chooses an appointment to reschedule, and enters an email ID if needed.
- The user chooses the date and time for the rescheduled appointment.
- The appointment rescheduling is complete.

The following image illustrates the appointment rescheduling flow.

Rescheduling an appointment



Cancelling an appointment

The appointment cancellation flow works as follows:

- The logged-in user contacts your business via your portal.
- The user enters the appointment booking request into the chat, and the Virtual Agent uses Now Assist to understand the request.
- The user chooses an appointment to cancel.
- The appointment cancellation is complete.

The following image illustrates the appointment cancellation flow.

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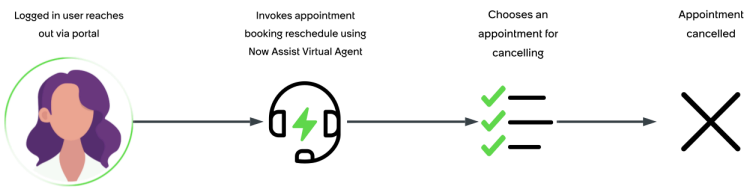
Cancelling an appointment



Related topics

Configure Conversational Appointment Booking

Using Conversational Appointment Booking

Install Conversational Appointment Booking

Install the Conversational Appointment Booking application (sn_va_appt_schedul) if you have the admin role. The application installs related ServiceNow® Store applications and plugins if they are not 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

About this task

Conversational Appointment Booking requires the following plugins. Ensure that these plugins are activated before you install Conversational Appointment Booking.

Required ServiceNow plugins

Walk-Up for CSM (com.snc.walkup_for_csm)

Note: Conversational Appointment Booking can be used without the Walk-Up for CSM plugin. However, custom control and Virtual Agent topic blocks shown in Configure Conversational Appointment Booking cannot be used without this plugin.

The following items are installed with this plugin:

- NLU model for Conversational Appointment Booking.

  Note: In order to use the NLU model, you need to train and publish the model. See (Legacy) Natural Language Understanding for more information.

- Virtual Agent topics: Schedule a Walk-up appointment, Reschedule a Walk-up appointment, and Cancel a Walk-up appointment.
- Virtual Agent topic blocks: Get Walk-up location and Walk-up appointment scheduling.

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Appointment Booking (com.snc.appointment_booking)

Enables the appointment booking feature for Walk-up Experience.

Glide Virtual Agent (com.glide.cs.chatbot)

Activates the Virtual Agent platform. Virtual Agent requires additional licensing. See Virtual Agent for more information.

NLU Workbench (com.snc.nlu_studio)

Enables the creation of custom ServiceNow Natural Language Understanding models used by Virtual Agent.

Studio (com.glide.dev-studio)

Used for adding and updating application files.

For information about plugin activation, see Activate a plugin.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Conversational Appointment Booking application (`sn_va_appt_schedul`) using the filter criteria and search bar.

   You can search for the application by its name or ID. If you cannot find the application, you might 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.

   Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install Conversational Appointment Booking.

4. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
5. Select **Install**.

Set up Configurable Portal widgets

Configurable Portal widgets provide you with the ability to configure the behavior, content, and layout of a portal by configuring instance options.

By using configurable widgets, you can configure widget behavior, visual appearance, and content to update the information presented on the widgets. Configurable widgets also reduce the amount of work required to implement and maintain widgets for your users.

Configurable Portal widget benefits

Configurable Portal widgets offer the following benefits:

- Configurable behavior: Configure widget instance options to achieve behavioral variations tailored to your business environment.
- Reusability: The ability to update instance options enables you to reconfigure widgets having to create new widgets from scratch.

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- Visual experience: Improve the usability and aesthetics of widgets and their conformance to your organization's look and feel by configuring visual aspects including colors, alignment, and styles.
- Content modification: Control the data sources or content that you want to display on the portal by mapping the widgets to data sets and configuring filters or parameters to control the information presented.
- No code or low code configuration: Update the data, behavior, and presentation of the widgets with minimal code or by updating the instance options.

For more information on using configurable widgets in your customer portals, see Using portal widgets.

Widget instances

You can use widget instances to configure the location, properties, and CSS specific to that instance. For more information, see Configure widget instances.

The following are Configurable Portal widgets that enable you to configure the portal homepage.

Widget	Description
Portal Polaris Header widget	Display access key features and pages from any place in portal. It shows logo, search, profile, and others on level 1 of the header, and menu items on level 2 of the header. The appearance of menu items in level 2 of the header is determined by the Portal Mega Menu widget selected.
Portal Mega Menu widget	The menu on the header of the portal home page to navigate to different pages. It displays topics in a menu format organized hierarchically.
Portal Browse Taxonomy widget	Display taxonomy topics along with the articles and catalog items related to them.
Portal Banner widget	Banner to display the announcements, new product or feature highlights, and important information on the top of the page.
Portal Banner Carousel widget	Displays multiple banners in a carousel to display information on multiple announcements, features, and products.
Portal Quick Links widget	Display different links for quick access including links to a knowledge article, a catalog item, a custom page, or an external URL. You can also select different layouts for quick links cards.
Portal Knowledge Quick Links widget	Display a list of articles for quick access. Articles can be selected based on featured articles, most viewed articles and more criteria or can be selected manually.
Portal Catalog Quick Links widget	Displays catalog items for important request items based on the criteria.
Portal Case Cards widget	Displays case records according to the filter criteria. You can display case details such as state, update, date, and more in a card format.
Portal Data List widget	Displays a list of cases, appointments, work orders, or other records from any ServiceNow table in list or card format.

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Widget	Description
Portal FAQ widget	Displays a list of frequently asked articles from a selected knowledge table that are categorized based on knowledge article category or related product.
Portal Polaris Footer widget	Display important information at the bottom of each page. The information includes company information and logo, site links, external links, and social media links.
Portal Object widget	Display key information of a record from the tables available on ServiceNow® table. Your users can also take related actions on the selected record.
Portal Taxonomy Topic widget	Displays topics as cards on your portal page enabling your users to access knowledge articles and catalog items related to a topic displayed on your portal in a Portal Browse Taxonomy widget.

Activate the UI Components for Customer Portals plugin

You can activate the UI Components for Customer Portals plugin (sn_ciwf_ui_cmpnt) to enable Configurable Portal widgets. The application installs related plugins if they aren't already installed.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Create a page for Configurable Portal widgets

Create a page into which you can add Configurable Portal widgets.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.

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3. On the Service Portal Designer page, select **Add a new Page**.
4. Enter the text for the page title.
5. Enter an ID for the page that does not include spaces or any special character except for an underscore.
6. Select **Submit**.

Result

The page is created in the Service Portal Designer.

Portal Polaris Header widget

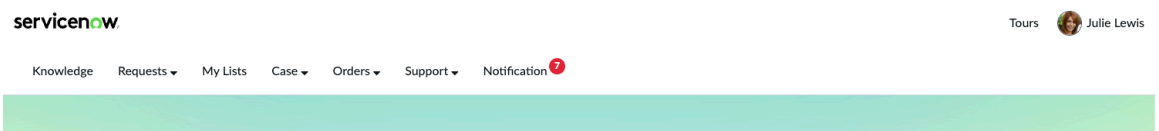
The Portal Polaris Header widget enables your users to quickly access key features, pages, and links from any place in the portal. You can select the Portal Polaris Header widget in the theme record, which is mapped to your portal.

You can display the logo, search, profile, and others on level 1 and menu items on level 2 of the header. The appearance of the menu items in level 2 of the header is determined by the widget selected in the menu record mapped to the portal. To enable a multi-level hierarchy for your menu items, you must select the Portal Mega Menu widget. For more information, Portal Mega Menu widget.

The following items that appear on level 1 and level 2 of the header menu and are configured on the portal record and menu record associated with the portal.

- Level 1 header consists of logo, search, language selector, profile, tours, notification approvals, surveys, wish list, and cart.
- Level 2 header consists of Main menu and sub menu items.

Portal Polaris Header widget - Desktop view



Additionally, in the mobile view, you can access all the menu items that are grouped by categories. Currently, the mobile view support isn't available for guided tours and language selector menu items.

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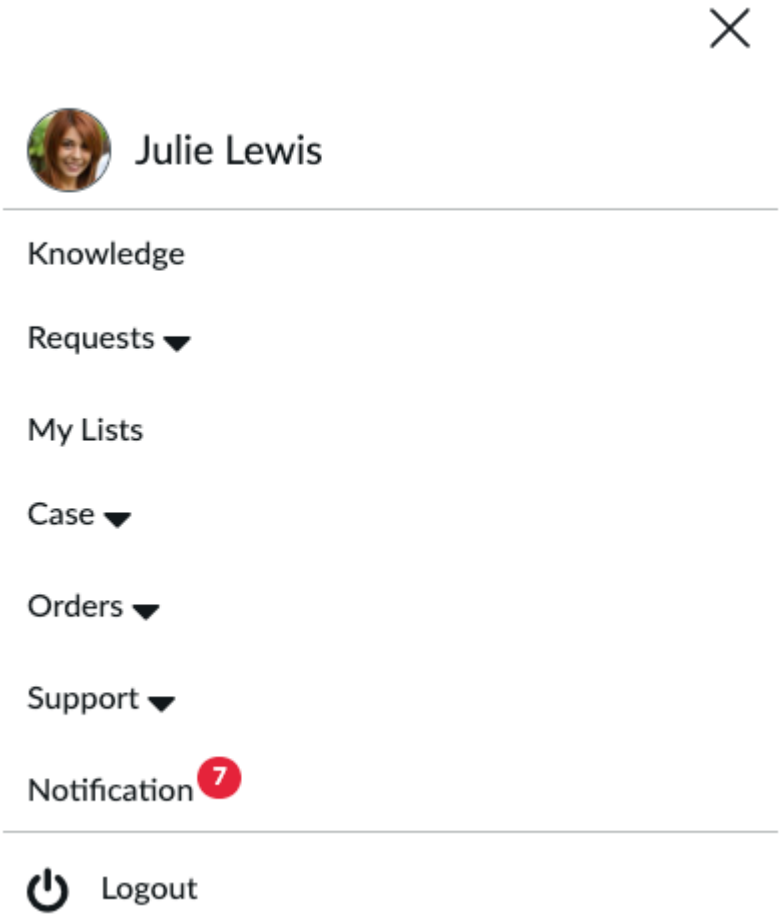
Portal Polaris Header widget - Mobile view



Configure the Portal Polaris Header widget for your portal

Associate the Portal Polaris Header widget as your header for the selected theme on your portal.

Before you begin

Role required: sp_admin

About this task

Unlike other widgets in the Configurable Portal widgets, the Portal Polaris Header widget can't be dragged onto a page. Instead, you must configure it by associating the header menu with the selected theme for your portal.

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portals page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, in the **Theme** field, select the Preview this record icon (ⓘ).
4. Select **Open Record** on the Theme pop-up window.
5. On the Portal Theme page, in the **Header** field, select the Lookup using list icon ( ).

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

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6. On the Header | Footers page, search and select **Portal Polaris Header**.
7. Select **Update**.

Result
The Portal Polaris Header is set as a header for the Portal Next Experience theme.

Configure company logo on your portal header

Display your company logo on the header of your portal.

Before you begin
Role required: sp_admin

Procedure
1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, add an image in the **Logo** field.
4. Select **Update**.

Result
Your company logo appears on the left side of the header of your portal.

Configure the search option for your portal header

Configure search feature to display search option on you portal.

Before you begin
Role required: sp_admin

Procedure
1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, in the **Quick start config** field, modify the JSON as shown.

```
"headerSearch": {
                "display_search": true,
"search_placeholder_text": "Search articles and request items",
"exclude_search_for_pages": "csm_home_new"
```

Note: You can also modify the placeholder text. The default text is `Search articles and request items`.

4. Modify the placeholder text.
   The default text is `Search articles and request items`.
5. Select **Update**.

Configure a wishlist and cart for your portal header

Display a wishlist and cart on your portal header.

Before you begin
Role required: sp_admin

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Procedure

1. Modify JSON.

   a. Navigate to **All** > **Service Portal** > **Portal**.

   b. On the Service Portal page, search and select `Customer Support` in the Title column.

   c. On the Customer Support page, in the **Main menu** field, select the Preview this record icon (ⓘ).

   d. Select **Open Record** on the Instance with Menu pop-up window.

   e. On the Portal revamp demo menu page, in the **Additional options, JSON format** field, modify the JSON as shown.

```
{

  "enable_cart": {
    "displayValue" : "true",
    "value": false
  },
  "enable_wishlist": {
    "displayValue" : "true",
    "value": false
  }
}
```

   f. Select **Update**.

2. Enable wish list.

   a. Navigate to **Service Catalog** > **Maintain Catalogs**.

   b. Open **Customer Service** record.

   c. Select **Enable Wish List** check-box.

   d. Select **Update**.

Configure notification, approval, and survey for your portal header

Display menu items like notification, approval, and survey on your portal header.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Portal**.
2. On the Service Portal page, search and select `Customer Support` in the Title column.
3. On the Customer Support page, in the **Main menu** field, select the Preview this record icon (ⓘ).
4. Select **Open Record** on the Instance with Menu pop-up window.
5. On the Portal revamp demo menu page, select **New** in the related list and create notifications, approvals, and surveys.

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6. Create a notification item on the header.

   a. On the form, fill in the fields.
   For a description of the field values, see Portal Header notification, approval, and survey form.

   b. Select **Submit**.

7. Create an approval item on the header.

   a. On the form, fill the fields.
   For a description of the field values, see Portal Header notification, approval, and survey form.

   b. Select **Submit**.

8. Create a survey item on the header.

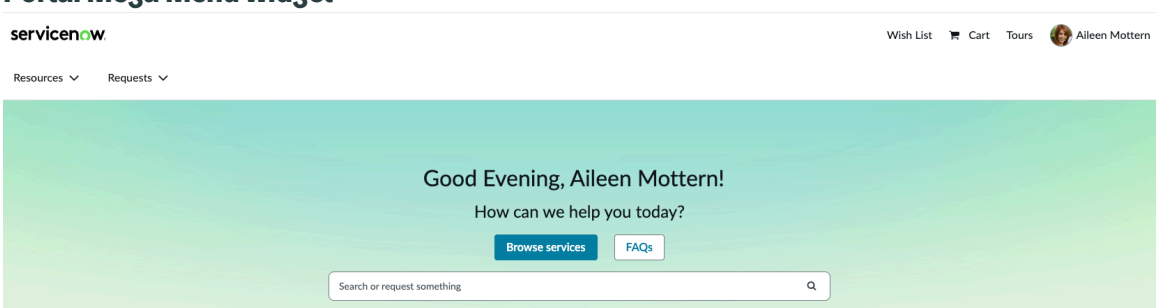
   a. On the form, fill the fields.
   For a description of the field values, see Portal Header notification, approval, and survey form.

   b. Select **Submit**.

Portal Mega Menu widget

The Portal Mega Menu widget displays a hierarchical menu on the header of the portal home page to enable navigation to different pages. You can also display a cart, wish list, guided tour, and scripted list such as notification, approval, and survey on the header of your portal.

Portal Mega Menu widget



For more information about how to configure the Portal Mega Menu widget, see Configure the category of a Portal Mega Menu widget.

Configure the category of a Portal Mega Menu widget

Configure a Portal Mega Menu widget to define a menu category and associate pages to it to be able to navigate easily to different pages from the portal page.

Before you begin

The UI Components for Customer Portals plugin must be installed. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin

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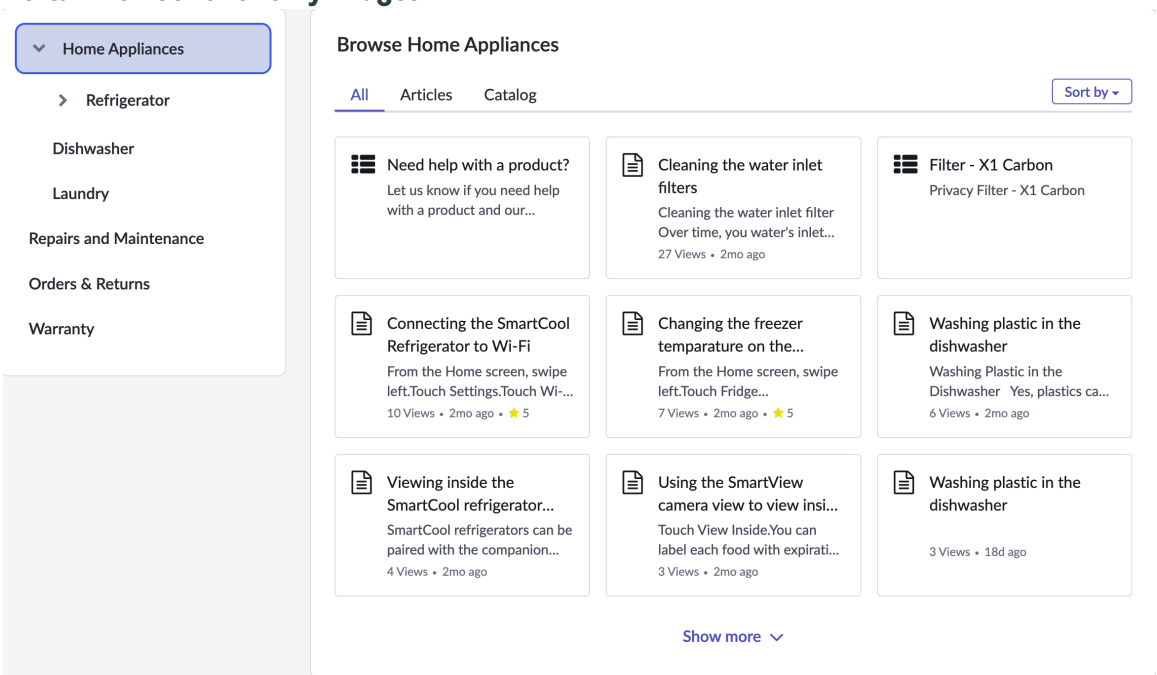
Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portals page, in the **Title** column, enter `Customer Service`.
3. Select **Customer Service**.
4. On the Customer Service form, in the **Main menu** field, select the Preview this record icon ( ).
   If a message appears about the application scope, select **here** to be able to edit the record.
5. On the Instance with Menu pop up, select **Open Record**.
6. On the Instance with Menu form, if Portal Mega Menu doesn't appear in the **Widget** field, search for and select it.
7. Select **Update**.
8. On the CSP Header Menu page, in the Related Links section, select the category that you want to update.
9. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form .
10. Select **Update**.

Portal Browse Taxonomy widget

The Portal Browse Taxonomy widget displays hierarchical taxonomy topics that enable your users to navigate to knowledge articles and catalog items through the widget's navigation pane.

Portal Browse Taxonomy widget



For more information about how to configure the Portal Browse Taxonomy widget using the instance options, see Add and configure the Portal Browse Taxonomy widget.

Add and configure the Portal Browse Taxonomy widget

Add the Portal Browse Taxonomy widget to your portal and modify its behavior. The widget displays taxonomy topics along with the articles and catalog items related to them.

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Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

You must have the following setup in order to add, update, and use this widget:

- The page to which you want to add the widget. For more information, see Create a page for Configurable Portal widgets
- A taxonomy to map your content. For more information, see Create taxonomy.
- At least one taxonomy associated with your portal. For more information, see Add a taxonomy to your portal.
- At least one topic associated with the taxonomy. For more information, see Create and associate topics.
- Topics associated with knowledge categories and catalog categories. For more information, see Associate content categories to topics and Associate content from catalog categories to a topic.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the Widgets pane, in the **Filter Widget** field, enter `Portal Browse Taxonomy`.
7. Drag the Portal Browse Taxonomy widget onto the container layout.
8. In the Edit page, select a Portal Browse Taxonomy widget.
9. Select the Pencil icon ( ).
10. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Browse Taxonomy widget instance options form.

Add a taxonomy to your portal

Create a taxonomy to organise knowledge articles and catalog items under topics which are relevant to your user. Associate a taxonomy to your portal to display the relevant topics on the widgets.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portal page, search `Customer Support` in the **Title** column.
   You can select any portals and a taxonomy to it.
3. On the Customer Support page, in the related list, select the **Taxonomy** tab.
4. In the Taxonomy tab, move any taxonomy from the Collection to the Taxonomy list.

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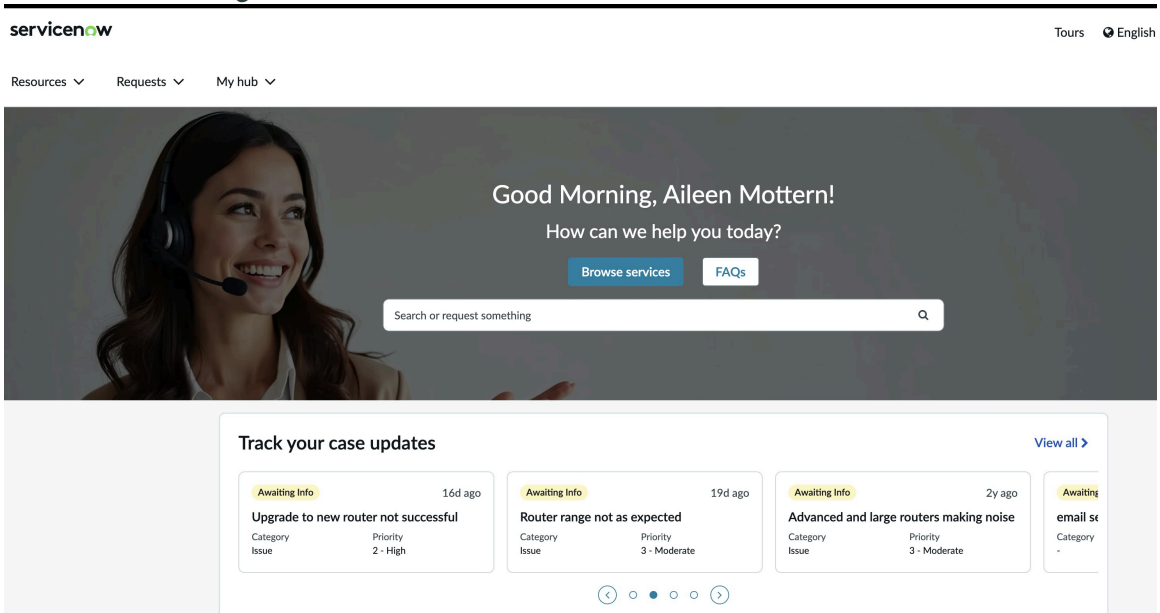
Portal Banner widget

You can use the Portal Banner widget to display announcements, new product or feature highlights, and important information on the portal page.

Portal Banner widget



For information about how to configure instance options for the Portal Banner widget, see Add and configure the Portal Banner widget.

Add and configure the Portal Banner widget

Add a Portal Banner widget to your portal and modify its appearance and behavior. You can use the Portal Banner widget to display announcements, new product or feature highlights, and important information on the portal page.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

About this task

https://player.vimeo.com/video/1086566146?h=4550386275&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Add container.
   a. Select the **Widgets** tab.
   b. In the Layouts section, drag the Container layout onto the portal edit page.

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c. On the container, select the Pencil icon ( ).

d. In the **Width** field, select **Fluid**.

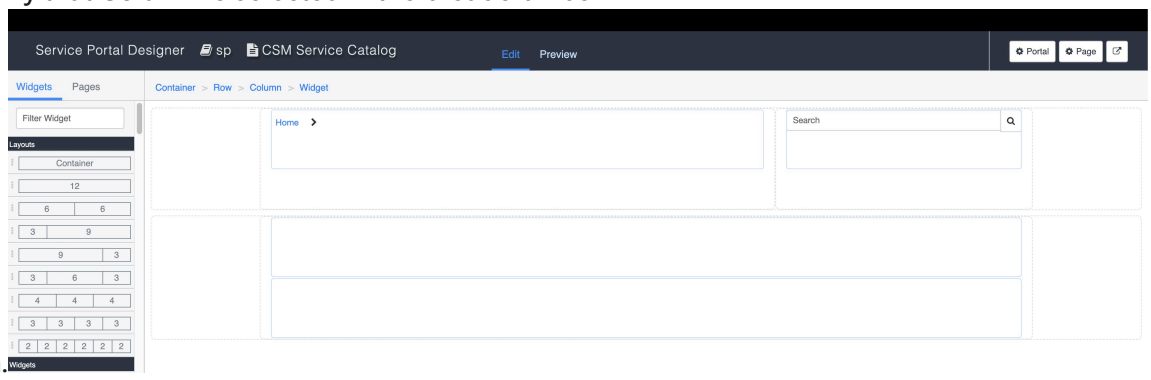
e. Select **Save**.

5. Add columns to container.

a. On the container, add a set of columns by selecting the plus button ( ).

b. In the column, select the Edit page properties icon ( ) in the banner in Service Portal Designer.

Note: Verify that **Column** is selected in the breadcrumbs navigation.



c. On the Page window, in the **Page Specific CSS** field, paste the following CSS code.

```
.col-md-12{
     padding-left: 0;
     padding-right: 0;
 }
.padding-top {
     padding-top: 0;
 }
```

If a message appears about the application scope, select **here** to be able to edit the record.

d. Select **Save**.

6. Add portal banner widget.

a. On the Widgets pane, in the **Filter Widget** field, enter `Portal Banner`.

b. Drag the widget onto the container.

c. In the Edit page, select the Portal Banner widget.

d. Select the Pencil icon ( ).

e. On the Instance form, in the **Presentation** field, paste the following JSON code into the **Search Placeholder Text** field.

```
{
    "title": "enter the title",
    "size": "enter the size of search bar",
```

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```
    "color": "enter color"
}
```

For more information about each parameter, see Script parameters for the search option in the Portal Banner widget.

f. On the Instance form, fill in the fields.
For a description of the field values, see Portal Banner widget instance options form.

g. Select **Save**.

Provide web page link buttons to display on the Portal Banner widget

Provide a link to a web page that you want to display by defining primary or secondary buttons on the Portal Banner widget. The widget displays these buttons by default.

Before you begin

The UI Components for Customer Portals plugin must be installed. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. On the Extension Points page, in the API Name column, enter `*banner`.
3. Select **sn_ciwf_ui_cmpnt.BannerButtonsConditionScript** in the **API Name** column.
If a message appears about the application scope, select **here** to be able to edit the record.
4. On the BannerButtonsConditionScript page, in the Related links section, select **Create Implementation**.
If a message appears about the application scope, select **here** to be able to edit the record.
5. On the BannerButtonsConditionScript page, in the **Script** field, define the primary and secondary buttons by pasting the following CSS code and then customizing it.

```
var BannerButtonsConditionScript = Class.create();
BannerButtonsConditionScript.prototype = {
    initialize: function() {
    },

 showPrimaryButton: function() {
  // add your condition here
  return true;
 },

 showSecondaryButton: function() {
  // add your condition here
  return true;
 },

    type: 'BannerButtonsConditionScript'
};
```

6. Copy the name of the condition script from the **Name** field.
7. Select **Update**.
8. Navigate to your portal home page.

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9. On the Edit page, select the Portal Banner widget.
10. Press Control+right-click.
11. Select **Instance Options**.
12. In the **Behavior** section, paste the name that you copied into the **Button Condition Script** field.
13. Select the condition script from the list.
14. Select **Save**.

Add a widget in the Portal Banner widget

Add a widget for additional functionality to the Portal Banner widget and configure it. For example, you could add the Portal Quick Links widget to enable users to access knowledge articles, external URLs, catalog items, or custom pages from the Portal Banner widget.

Before you begin

The UI Components for Customer Portals plugin must be installed. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin

Procedure

1. Navigate to your portal home page.
2. On the widget you want to add, press Control+right-click.
3. In the context menu, select **Instance in Page Editor**.
4. In the Edit section, select the Portal Quick Links widget from the flowchart.
   The Portal Quick Links widget has been considered as an example.
5. Select the **Instance 2**.
6. Copy the JSON code from the **Additional options, JSON format** field.
7. On your portal home page, press Control+right-click on the Portal Banner widget..
8. Select **Instance Options**.
9. In the **Behavior** section, paste the JSON code into the **Widget Option Schema** field.
10. In the **Widget Option Schema** field, modify the JSON code to update the configuration of the widget that you've added.
    For more information on each JSON parameters of the Portal Quick Links widget, see Portal Banner widget JSON parameters.
11. Select **Save**.

Configure localization for Portal Banner heading

Configure the portal banner heading instance option to support localization and personalize the portal experience for different users.

Before you begin

Role required: sp_admin

About this task

The portal banner widget enables you to customize the heading text displayed to users on the business portal. You can modify the heading text from the instance options and then create a translation record in the sys_ui_message table. This setup lets you personalize user experience across different regions and languages.

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Procedure

1. Configure the instance option.

   a. Navigate to the page/portal where the widget is configured.

   b. Press Control+right-click on the Portal Banner widget and select **Instance Options**.

   c. In **Heading**, enter the desired text.
   For details on filling the Heading field, see Portal Banner widget instance options form.

2. Create a translation record (for localization).

   a. Navigate to **All** > **System Localization** > **Messages**.

   b. Select **New**.

   c. On the Message New Record form, fill in the fields.

Message New Record form

Field	Description
Key	Exact text as configured in the instance option. Pass the parameters, if you have used variables in the heading field: ▪ <user>: {firstName} {lastName} ▪ <title>: {title}
Language	Target language
Code	sn_ciwf_ui_cmpnt
Message	Translation of text entered in the Key field.

   d. Select **Submit**.

Result

A new translation record is created which supports localization.

Portal Banner Carousel widget

A carousel in your home page banner can display multiple announcements and highlight brief information on features and products.

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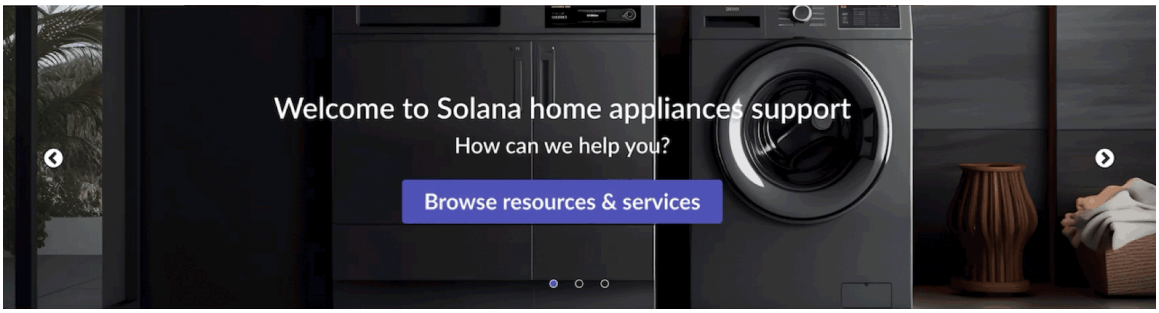
Portal Banner Carousel widget

The following image shows a sample carousel widget on a portal home page.



For more information, see Add and configure the Portal Banner Carousel widget

Add and configure the Portal Banner Carousel widget

Add a Portal Banner Carousel widget to the portal and modify its presentation and behavior.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, select the Pencil icon ( ).
7. In the **Width** field, select **Fluid**.
8. Select **Save**.
9. On the container, add a set of columns by selecting the plus button ( ).
10. In the column, select the Edit page properties icon ( ) in the Service Portal Designer banner.

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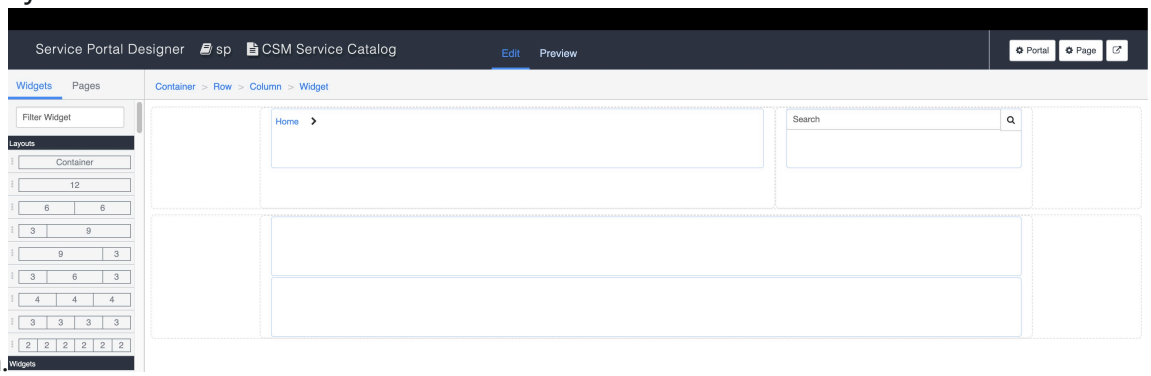
Note: Verify that **Column** is selected in the breadcrumbs navigation.



11. On the Page window, in the **Page Specific CSS** field, paste the following CSS code:

```
.col-md-12{
     padding-left: 0;
     padding-right: 0;
 }
.padding-top {
     padding-top: 0;
 }
```

If a message appears about the application scope, select **here** to be able to edit the record.

12. Select **Save**.
13. On the Widgets pane, in the **Filter Widget** field, enter `Portal Banner Carousel`.
14. Drag the widget onto the container.
15. In the Edit page, select the Portal Banner Carousel widget.
16. Select the Pencil icon ( ).
17. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Banner Carousel widget instance options form.
18. Select **Save**.

Create a slide for the Portal Banner Carousel widget

Create a slide to include images in the Portal Banner Carousel widget that a user can scroll through.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

Role required: sp_admin

Procedure

1. Select **All**.
2. In the filter navigator, enter `sp_carousel_slide.list`.
3. On the Carousel Slides page, select **New**.
4. On the Carousel slides form, fill in the fields.

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Carousel slides form

Field	Description
Name	Name of the carousel slide.
HREF/URL	The URL that opens an internal web page or a portal page in the same tab and an external page or a portal in a new tab. **Note:** For more information about linking to a page within a portal, see Page navigation in Service Portal by URL.
Application	The application that contains this configuration record. This field is automatically set to Global.
Background	Image to appear as the background of the slides in the carousel. The recommended dimension is 1022x300 pixels

5. Select **Submit**.

Result

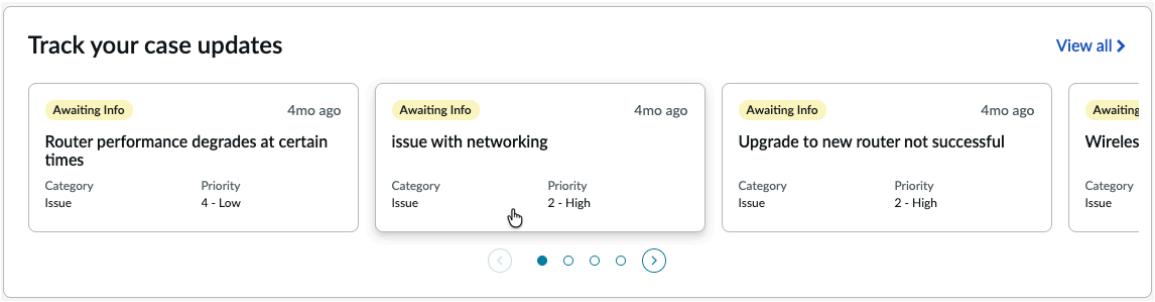
The slide is created and appears on the Carousel Slides (sp_carousel_slide) page.

Portal Case Cards widget

The Portal Case Cards widget displays cards for cases that you define. By default, the displayed cases are those awaiting information or are resolved. You can choose to define different criteria.

The following illustration shows the default card view with cases that are currently in the awaiting info and resolved states.

Portal Case Cards widget



For more information about how to configure the instance options for the Portal Case Cards widget, see Add and configure the Portal Case Cards widget.

Add and configure the Portal Case Cards widget

Add a Portal Case Cards widget to your portal and modify its data, presentation, and behavior. You can use the Portal Case Cards widget to display status, priority, and other relevant details related to your cases.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

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Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Case Cards`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Case Cards widget.
10. Select the Pencil icon ( ).
11. If you want to use configured background and text colors to indicate the state of the cases displayed in the widget, enter JSON code in the following format in the **State Highlight Color** field and modify it with your desired colors.

    The default text color for all case states is #181A1F (black). If you create a state, the default highlight color is #CBE9FC (light blue) and the text color is #181A1F (black). For more information about the default color values, see Default highlight color for different case states.

```
[
  {
    "value": "1",
    "background_colour": "#CBE9FC",
    "text_colour": "#181A1F"
  },
  {
    "value": "10",
    "background_colour": "#D1D2EE",
    "text_colour": "#181A1F"
  },
  {
    "value": "18",
    "background_colour": "#FBF7BF",
    "text_colour": "#181A1F"
  },
  {
    "value": "6",
    "background_colour": "#D2EABC",
    "text_colour": "#181A1F"
  },
  {
    "value": "3",
    "background_colour": "#C2C4CA",
    "text_colour": "#181A1F"
  },
  {
    "value": "7",
    "background_colour": "#FFCCD2",
    "text_colour": "#181A1F"
```

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```
  }
]
```

For <value>, enter an integer value of the case state for which you want to change the colors. For more information about finding this value, see Display the integer values of all case states.

12. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Case Cards widget instance options form.
13. Select **Save**.

Display the integer values of all case states

Display the integer values of all of the states associated with cases.

Before you begin

Role required: sp_admin

Procedure

1. Navigate to **All** > **System Definitions** > **Choice Lists**.
2. On the Choices page, in the **Table** column, enter `*sn_customerservice_case`.
3. In the Element column, enter `state`.

Result

The Value column on the Choices page displays the integer values of all the states related to a case.

Portal Quick Links widget

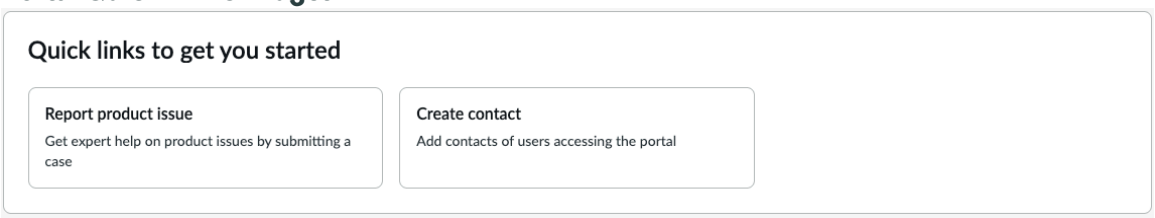
The Portal Quick Links widget displays a variety of links to internal and external resources on the portal for quick access.

The quick links in the portal widget enable your users to quickly access content on the portal. These quick links can be related to different types of information: knowledge articles, external URLs, catalog items, or custom pages.

The following types of Portal Quick Links widgets display quick links related to a single type of information: knowledge articles or catalog items:

- Portal Knowledge Quick Links widget: Displays quick links in the widget associated with relevant knowledge articles. For more information, see Portal Knowledge Quick Links widget.
- Portal Catalog Quick Links widget: Displays quick links in the widget associated with relevant catalog items. For more information, see Portal Catalog Quick Links widget.

Portal Quick Links widget



For more information, see Add and configure the Portal Quick Links widget.

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Add and configure the Portal Quick Links widget

Add a Portal Quick Links widget to the portal and modify its presentation and behavior. You can use the Portal Quick Links widget to display knowledge articles, external URLs, catalog items, or custom pages on your portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

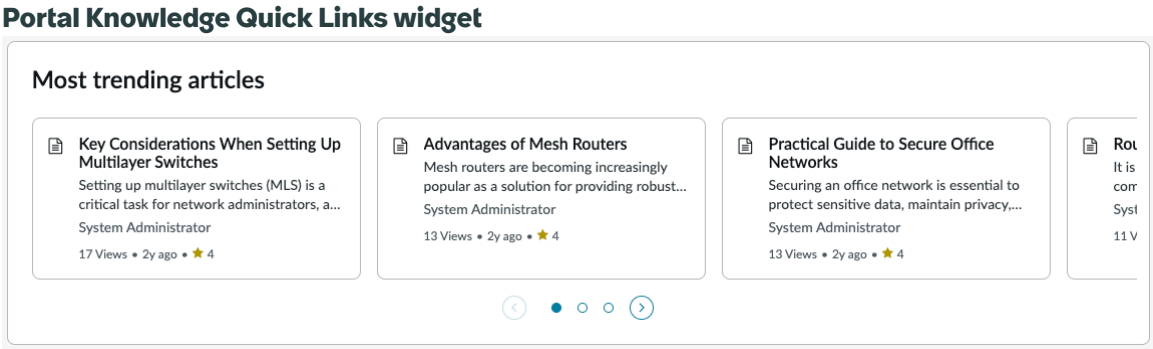
Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Quick Links`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Quick Links widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Quick Links widget instance options form.
12. Select **Save**.

Portal Knowledge Quick Links widget

The Portal Knowledge Quick Links widget displays a list of relevant knowledge articles for quick access on the portal. The card displays article details such as the title, preview, author, view count, rating, and updated date in the widget.

Portal Knowledge Quick Links widget



For more information, see Add and configure the Portal Knowledge Quick Links widget.

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Add and configure the Portal Knowledge Quick Links widget

Add a Portal Knowledge Quick Links widget to the portal and modify its data, presentation, and behavior.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, seeActivate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Knowledge Quick Links` .
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Knowledge Quick Links widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Knowledge Quick Links widget instance options form.
12. Select **Save**.

Result

The Portal Knowledge Quick Links widget appears in the widget according to the configured instance options.

Portal Catalog Quick Links widget

The Portal Catalog Quick Links widget displays catalog items according to filter criteria, enabling you to include an image, icon, name, and description on the card.

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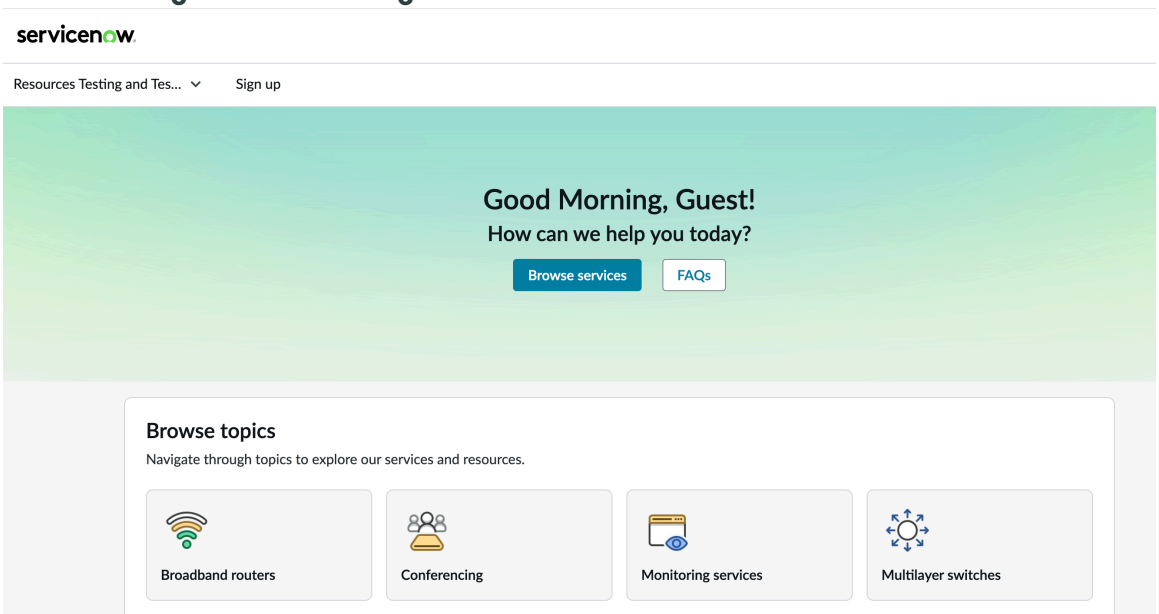
Portal Catalog Quick Links widget



For more information about how to configure the instance options for Portal Catalog Quick Links, see Add and configure the Portal Catalog Quick Links widget.

Add and configure the Portal Catalog Quick Links widget

Add a Portal Catalog Quick Links widget on your portal and modify its data, presentation, and behavior. You can use the Portal Catalog Quick Links widget to display frequently accessed catalog items on your portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Catalog Quick Links`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Catalog Quick Links widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.

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For a description of the field values, see Portal Catalog Quick Links widget instance options form.

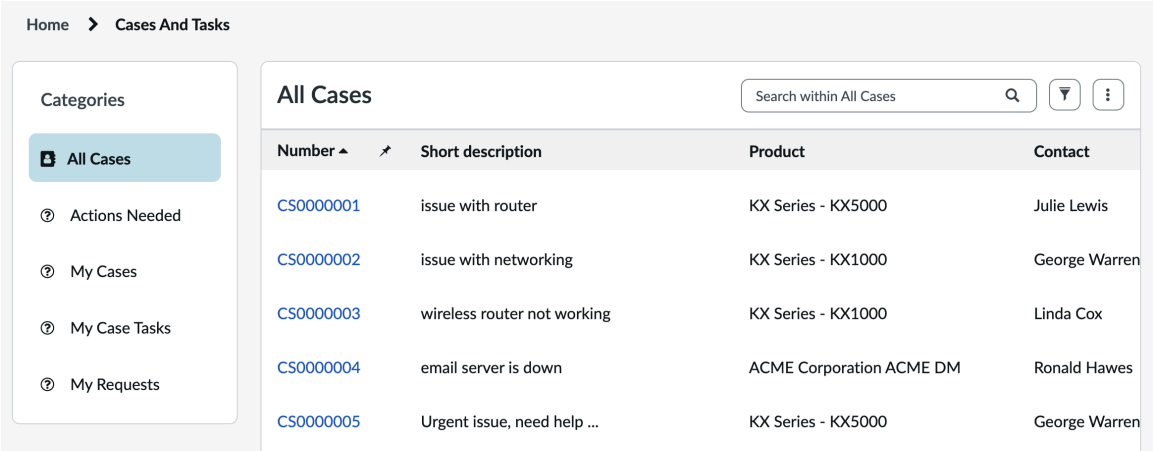
12. Select **Save**.

Portal Data List widget

The Portal Data List widget displays data related to cases from selected case tables in either a list or card format.

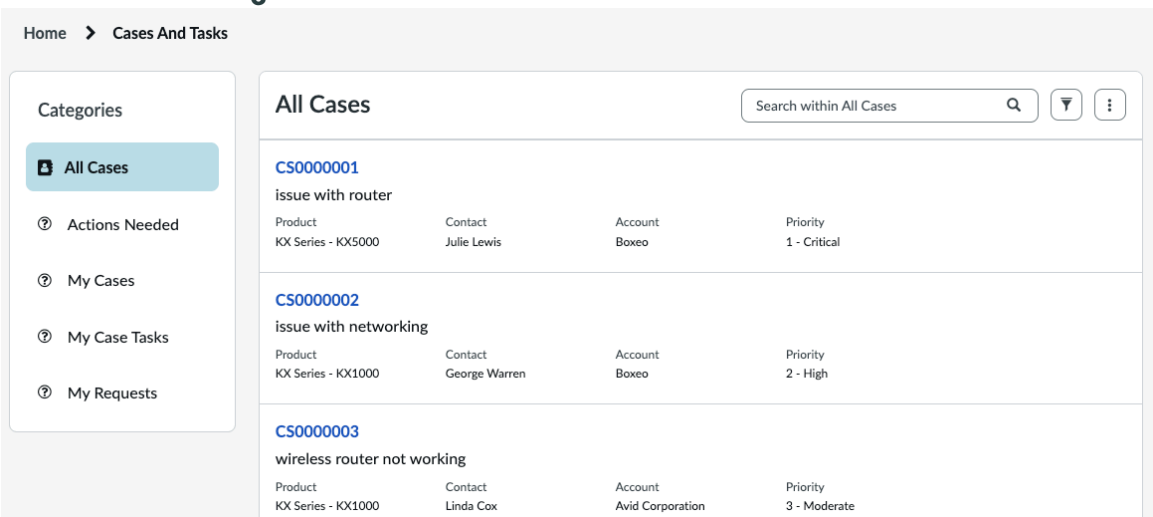
The list view displays a columnar list of cases and their information. You can also display the data list without the category on the left and pin the first column.

Portal Data List widget list view



The card view displays case information in stacked cards.

Portal Data List widget card view



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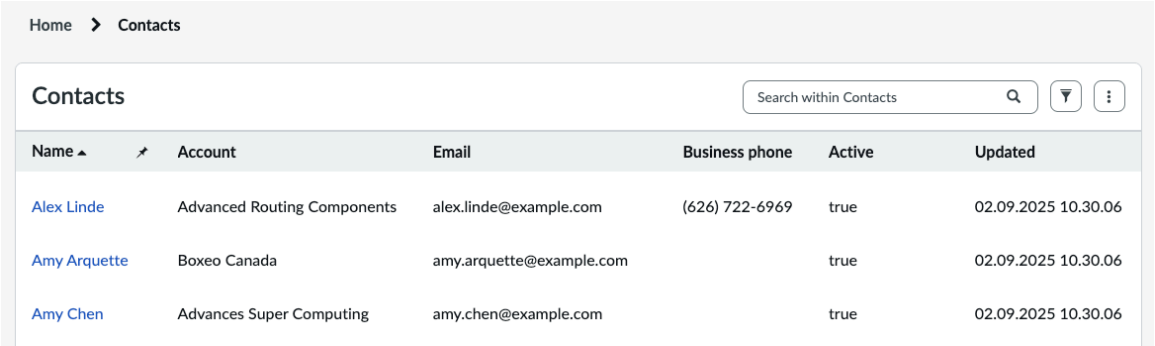
Portal Data List widget without categories



Each row in the widget represents a record. You can search, view, sort, and interact with the information presented.

For more information about how to configure the instance options for the Portal Data List widget, see Add and configure the Portal Data List widget.

The Data List portal widget can be used in the following scenarios:

- Dynamic data list: Enables you to display records dynamically based on the configuration provided in the URL parameters. It avoids the need to create duplicate list pages. You can use a common page to display records from any table by passing the following URL parameters: table, filter, sort order, view, and target view page.
- Static data list: Ability to display records from one or more tables specified in the widget instance options. It enables you to personalize the data list experience for a particular entity or table, such as cases, products, contacts, and so on.
- Related data list: Enables you to display records associated with an entity on the record view page. The data list is configured to identify the entity specified in the URL and filters the records accordingly.

Add and configure the Portal Data List widget

Add a Portal Data List widget to your portal and modify its data, appearance, and behavior. You can use the Portal Data List widget to display different case-related data in a card or list format on your portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).

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7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Data List`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Data List widget.
10. Select the Pencil icon ( ).
11. On the instance options page, in the **Data** field, paste and update the following JSON code to configure the lists.

```
[

  {

    "category": "All Cases",

    "ID": "all_cases",

    "table": "sn_customerservice_case",

    "view": "csp",

    "card_view_primary_column": "number",

    "card_view_secondary_column": "short_description",

    "card_view_additional_columns":
 "product|contact|account|priority",

    "target_page_id": "standard_ticket",

    "guest_view": "connect",

    "scope_runtime_filters_to_sub_category": true,

    "role_based_views":{

     "field_service_agent_view":"snc_field_technician",


 "agent_case_view":["snc_customer_service_agent","snc_manager"]

     },

     "sub_categories": [

      {

        "sub_category": "Open",

        "sub_category_query": "active=true"

      },

      {

        "sub_category": "Closed",
```

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```
        "sub_category_query": "active=false"
      }
    ],
    "run_time_filters": [
      {
        "column": "product",
        "selection_type": "multi_select",
        "show_all_reference_filter_values": true
      },
      {
        "column": "contact",
        "selection_type": "multi_select",
        "show_all_reference_filter_values": true
      },
      {
        "column": "account",
        "selection_type": "multi_select"
      },
      {
        "column": "priority",
        "selection_type": "multi_select"
      },
      {
        "column": "state",
        "selection_type": "multi_select"
      },
      {
        "column": "sys_updated_on",
        "selection_type": "single_select",
```

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```
        "ranges": [

          {

            "label": "Last 30 days",

            "query":
 "sys_updated_on<=javascript:gs.endOfToday()^sys_updated_onRELA
TIVEGT@dayofweek@ago@30"

          },

          {

            "label": "Last 60 days",

            "query":
 "sys_updated_on<=javascript:gs.endOfToday()^sys_updated_onRELA
TIVEGT@dayofweek@ago@60"

          },

          {

            "label": "Last 90 days",

            "query":
 "sys_updated_on<=javascript:gs.endOfToday()^sys_updated_onRELA
TIVEGT@dayofweek@ago@90"

          },

          {

            "label": "Before 90 days",

            "query":
 "sys_updated_onRELATIVELT@dayofweek@ago@90"

          }

        ]

      }

    ]

  },

  {

    "category": "Actions Needed",

    "table": "sn_customerservice_case",

    "view": "Case",
```

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```
    "card_view_primary_column": "number",

    "card_view_secondary_column": "short_description",

    "card_view_additional_columns":
 "product|priority|state|contact",

    "filter": "stateIN6,18",

    "glyph": "check",

    "target_page_id": "csm_ticket"

  },

  {

    "category": "Work Orders",

    "table": "wm_order",

    "card_view_primary_column": "number",

    "card_view_secondary_column": "short_description",

    "card_view_additional_columns": "priority|state",

    "glyph": "briefcase"

  }

]
```

For more information, see Portal Data List widget JSON parameters.

Each category in the widget displays a list of filtered records from a selected table. The default table is the Case [sn_customerservice_case] table. In a category, you can further filter the records and display them in tabs using the *pre_defined_filters* parameter. You can also configure the filter options displayed in the filter icon using the *run_time_filters* parameter.

12. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Data List widget instance options form.
13. Select **Save**.

Configure public access on the Portal Data List widget

Configure the Portal Data List widget and page content for public access to enable guest users to view data without authentication.

Before you begin

Role required: sp_admin

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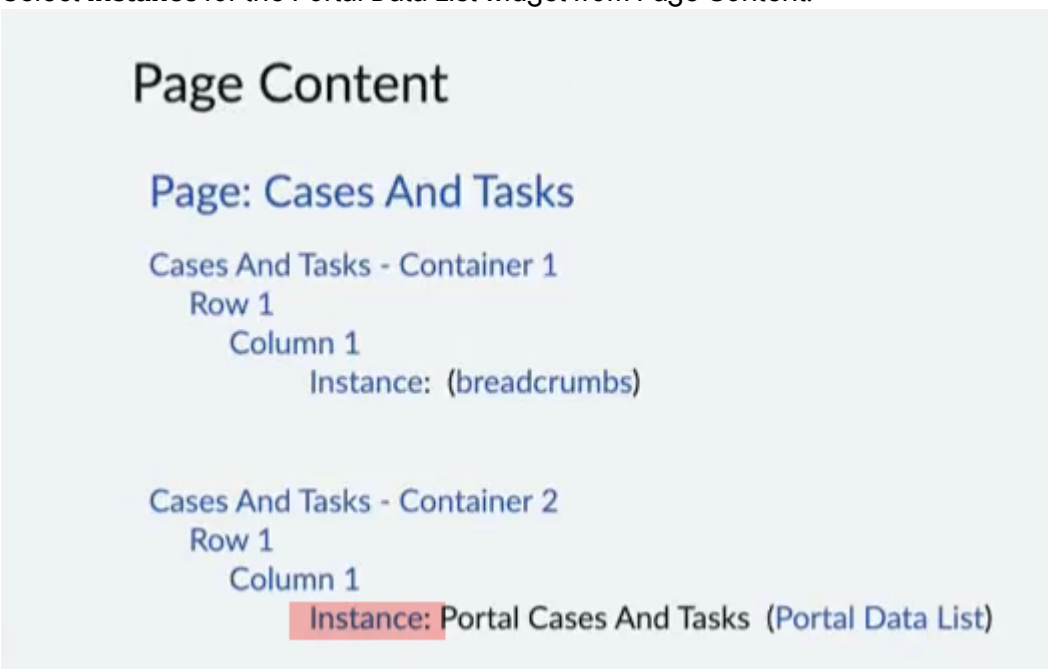
Procedure

1. Make Portal Data List Widget public
   a. Navigate to **All** > **Service Portal** > **Widgets**.
   b. Search and select `Portal data list` in the Name column.
   c. Select the **Public** check box.
   d. Select **Update**.
2. Make pages containing the Portal Data List widget public (For example, cases and tasks page).
   a. Navigate to **All** > **Service Portal** > **Pages**.
   b. Search and select the page containing the Portal Data List widget in the Title column (For example, cases and tasks page).
   c. Select the **Public** check box.
   d. Save the page.
   e. Select **Instance** for the Portal Data List widget from Page Content.



   The widget instance page opens.

   f. Select **Roles**.
   g. Search and move **public** from Available to Selected List.
   h. Select **Done**.
   i. Select **Update**.
3. Select **Update**.

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Hide or show categories in the Data List widget

Create a condition script to hide or show a category in the Portal Data List widget.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

Role required: sp_admin

Procedure

1. Navigate to **All** > **System Extensions Points** > **Scripted Extensions Points**.
2. On the Extension Points page, in the **API Name column** search field, enter `*datalist`.
3. Select the **sn_ciwf_ui_cmpnt.DatalistCategoryConditionScript** in the **API Name** column.
   If a message appears about the application scope, select **here** to be able to edit the record.
4. On the DatalistCategoryConditionScript page, in the Related links, select **Create implementation**.
5. In the **Script** field, paste the following CSS code:

```
showCategory: function(category_id, params) {

      /*
      if(category_id=="cases_category"){
          return true;
      }
      */
      return true;
    }
```

Function parameters

Parameters	Description
category_id	Portal Data List category id.
params	JSON containing url_params and related_table. For example, `{ "url_params": { "table": "customer_contact", "sys_id": "60beb5e7d7600200e5982cf65e6103ad", "view": "sp" }, "related_table": "sn_customerservice_case" }`

6. Copy the name of a condition script from the **Name** field.
7. Select **Update**.

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8. Navigate to your portal home page.
9. On the Data List widget, press Control+right-click.
10. Select **Instance Options**.
11. In the Behavior section, paste the name that you copied into the **Data List condition script** field.
12. Select the condition script from the list.
13. Select **Save**.

Modify view in the Data List widget

Create a condition script to modify views in the Portal Data List widget.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

Role required: sp_admin

About this task

Priority order for how the Data List widget determines the view

Priority	Source	Description
1 (Highest)	Script	If a Views Condition Script is configured and returns a view name, that view is used. Scripts have the most flexibility since they can apply custom logic using the parameters - `categoryId`, `params`.
2	role_based_views / guest_view	If no script is configured or the script doesn't return a view, the system checks the JSON instance options. • For logged-in users, it checks `role_based_views` to find a view matching the user's roles. • For non-logged-in users, it uses `guest_view` .
3	view	The widget uses the view JSON instance option if the script or role based view/guest view mappings doesn't apply.
4 (Lowest)	Default View on Platform	If no other configuration applies, the widget uses the platform's default view for the table.

Procedure

1. Navigate to **All** > **System Extensions Points** > **Scripted Extensions Points**.
2. On the Extension Points page, in the **API Name column** search field, enter `*datalist`.
3. Select the **sn_ciwf_ui_cmpnt.DatalistCategoryConditionScript** in the **API Name** column.

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If a message appears about the application scope, select **here** to be able to edit the record.

4. On the DatalistCategoryConditionScript page, in the Related links, select **Create implementation**.
5. In the **Script** field, paste the following CSS code:

```
getView: function(category_id, params) {
    return "case"; // view
}
```

Function parameters

Parameters	Description
category_id	Portal Data list category id.
params	JSON containing url_params and related_table. For example, `{ "url_params": { "table": "customer_contact", "sys_id": "60beb5e7d7600200e5982cf65e6103ad", "view": "sp" }, "related_table": "sn_customerservice_case" }`

6. Copy the name of a condition script from the **Name** field.
7. Select **Update**.
8. Navigate to your portal home page.
9. On the Data List widget, press Control+right-click.
10. Select **Instance Options**.
11. In the Behavior section, paste the name that you copied into the **Data List condition script** field.
12. Select the condition script from the list.
13. Select **Save**.

Filter records in the Data List widget

Create a condition script to filter records in the Portal Data List widget.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

Role required: sp_admin

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Procedure

1. Navigate to **All** > **System Extensions Points** > **Scripted Extensions Points**.
2. On the Extension Points page, in the **API Name column** search field, enter `*datalist`.
3. Select the **sn_ciwf_ui_cmpnt.DatalistCategoryConditionScript** in the **API Name** column.
   If a message appears about the application scope, select **here** to be able to edit the record.
4. On the DatalistCategoryConditionScript page, in the Related links, select **Create implementation**.
5. In the **Script** field, paste the following CSS code:

```
getQuery: function(category_id, params) {
    return “query”; // filter query
}
```

Function parameters

Parameters	Description
category_id	Portal Data List category id.
params	JSON containing url_params and related_table. For example, `{ "url_params": { "table": "customer_contact", "sys_id": "60beb5e7d7600200e5982cf65e6103ad", "view": "sp" }, "related_table": "sn_customerservice_case" }`

6. Copy the name of a condition script from the **Name** field.
7. Select **Update**.
8. Navigate to your portal home page.
9. On the Data List widget, press Control+right-click.
10. Select **Instance Options**.
11. In the Behavior section, paste the name that you copied into the **Data List condition script** field.
12. Select the condition script from the list.
13. Select **Save**.

Portal FAQ widget

The Portal FAQ widget displays a frequently asked questions list (FAQ) from the selected knowledge table in the widget on the portal. It enables your users to find answers to their queries

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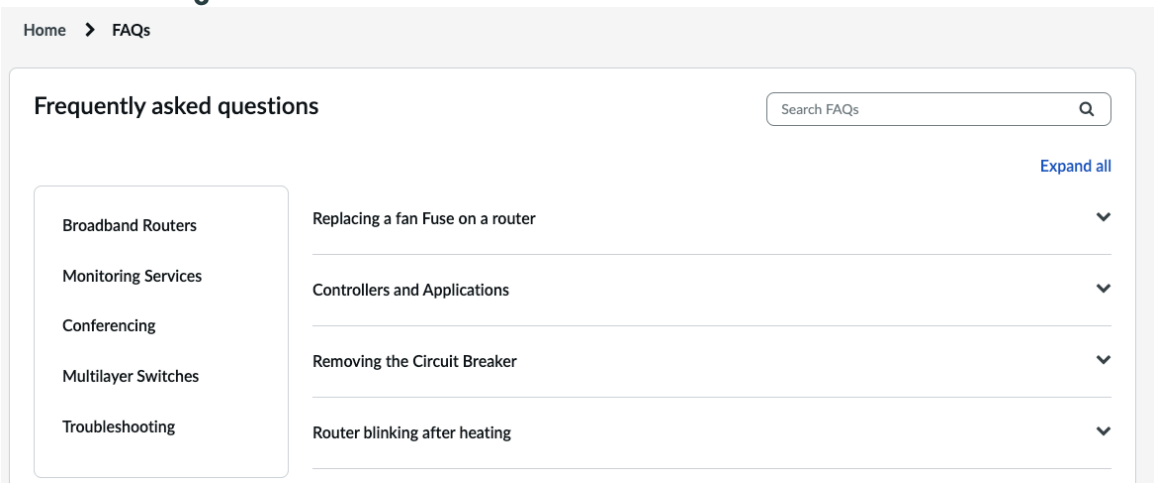
without the need to contact customer support or navigate through multiple knowledge article pages. You can filter the FAQs using options in the main navigation.

The following illustration shows five FAQs as the default view.

Portal FAQ widget



For more information, see Add and configure the Portal FAQ widget.

Add and configure the Portal FAQ widget

Add the Portal FAQ widget to your portal and modify its data, presentation, and behavior. You can use the Portal FAQ widget to display a frequently asked questions list (FAQ) from a knowledge table on the portal.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin.

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( )
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal FAQ`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal FAQ widget.
10. Select the Pencil icon ( ).
11. On the Instance form, fill in the fields.

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For a description of the fields values, see Portal FAQ widget instance options form

12. Select **Save**.

Portal Polaris Footer widget

The Portal Polaris Footer widget displays contact information, social media links, and other common links at the bottom of the portal page.

Include the Portal Footer widget on your portal page to display information about your company. The items you can display are:

- Organization logo on top-left corner of footer
- Organization address under the logo
- Sitemap links under different categories at the center of the footer
- Footer links at the bottom right of the footer
- Social media at the bottom right of the footer
- Copyright text on the bottom-right corner of the footer

Portal Polaris Footer widget

For more information, see Configure the Portal Polaris Footer widget.

Configure the Portal Polaris Footer widget

Configure the Portal Polaris Footer widget to display your company's corporate office address, email address, and more on the portal page.

Before you begin

The Portal Next Experience theme application should have been activated.

Role required: sp_admin

About this task

Procedure

1. Navigate to **All** > **Service Portal** > **Portals**.
2. On the Service Portal page, in the **Title** column, enter `*customer support`.
3. Select **Customer Support**.
4. On the Customer Support form, in the **Quick start config** field, paste the following JSON code and update it.

```
 [{

"footer": {
      "org_info": [
         "<line #1>",
         "<line #2>",
         "<line #3>"
      ],
      "copyright": "<copyright text>",
```

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```
        "logo_img_name": "<image name from db_image table>",
        "sitemap_links_menu_sys_id": "<enter the sys_id>",
        "footer_links_menu_sys_id": "<enter the sys_id>",
        "social_links_menu_sys_id": "<enter the sys_id>"
      }
}]
```

For more information about the parameters, see Portal Footer widget JSON parameters.

5. Select a theme for your portal.
   Note that the predefined La Jolla theme, used as an example, is active by default.

   a. In the Theme field, select the Lookup using list icon ( )

   b. On the Themes page, in the **Name** column, search for and select the `La Jolla` theme.
   The La Jolla theme is set as your portal theme.

6. Select the Portal Footer as the footer for your portal theme.

   a. In the **Theme** field, select the Preview this record icon ( ).

   b. On the Theme form, select **Open Record**.

   c. On the La Jolla form, in the **Footer** field, select the Lookup using list icon ( ).

   d. On the Header | Footers window, in the **Name** column, search for and select `Portal Footer`.

   e. Select **Update**.

What to do next

Configure links to appear in the Portal Footer widget:

- To add pages or sections of your website in a sitemap, see Configure sitemap links for the Portal Polaris Footer widget
- To add the social media accounts of your organization, see Configure social media links in the Portal Polaris Footer widget
- To include a link to a site on a portal page, see Add related links in the Portal Polaris Footer widget.

Configure sitemap links for the Portal Polaris Footer widget

Display links to various important pages or sections of your website in a sitemap. Sitemaps help users explore the site's content.

Before you begin

The Portal Next Experience theme should have been activated.

The Portal Polaris Footer widget must have been configured. For more information, see Configure the Portal Polaris Footer widget

Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Menus**.
2. On the Instances with Menu page, in the **Title** column, enter `Portal Footer Sitemap Links`.

   Note: You can create a new menu record by selecting **New**. After the record is created, update the Quick start config field with the new record's sys_id.

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3. Select the entry in the **Updated** column.
4. On the Portal Footer Sitemap Links page, in the Related Links, select the category that you want to configure.
5. On the Category page, in the Related links, select a sitemap link from the **Label** column.
6. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form.

   If a message appears about the application scope, select **here** to be able to edit the record.
7. Select **Update**.

Result
The sitemap links are configured and enabled.

Configure social media links in the Portal Polaris Footer widget

Configure links to your organization's social media accounts in the footer of the portal page.

Before you begin
The Portal Next Experience theme should have been activated.

The Portal Poalris Footer widget must have been configured. For more information, see Configure the Portal Polaris Footer widget.

Role required: sp_admin

Procedure
1. Navigate to **All** > **Service Portal** > **Menus**.
2. On the Instances with Menu page, in the **Title** column, enter `Portal Footer Social Links`.

   Note: You can create a new menu record by selecting **New**. After the record is created, update the **Quick start config** field with the new record's sys_id.
3. Select the entry in the **Updated** column.
4. On the Portal Footer Social Links page, in the Related Links, select any social link from the **Label** column.
5. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form.

   If a message appears about the application scope, select **here** to be able to edit the record.
6. Repeat these steps for any social media account for which you want a link in the portal footer.
7. Select **Update**.

Add related links in the Portal Polaris Footer widget

Configure the footer link to include a link to a site you want your users to be able to access from your portal page.

Before you begin
The Portal Next Experience theme should have been activated.

The Portal Polaris Footer widget must have been configured. For more information, see Configure the Portal Polaris Footer widget

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Role required: sp_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Menus**.
2. On the Instances with Menu page, in the **Title** column, enter `Portal Footer Links`.
3. Select the entry shown in the **Updated** column.
4. On the Portal Footer Links page, in the Related Links, select any category from the **Label** column.
5. On the Menu item form, fill in the fields.
   For a description of the field values, see Menu Item form.

   Note: If a message appears about the application scope, select **here** to be able to edit the record.

6. Select **Update**.

Result

The link is included in the portal footer and opens a web page when accessed.

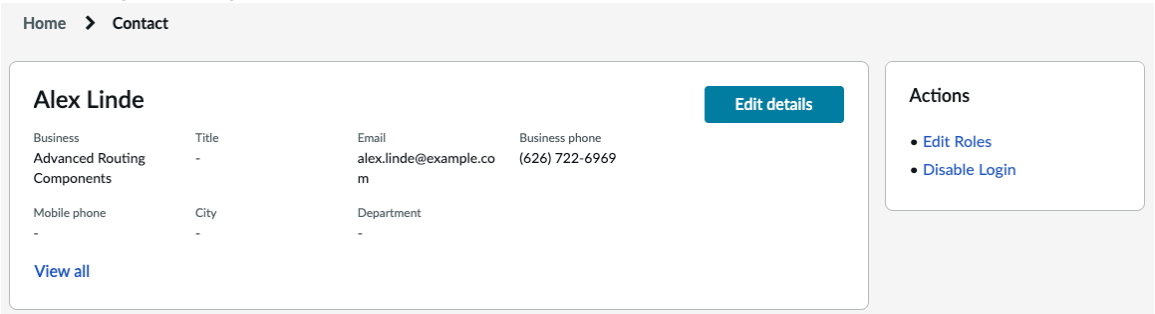
Portal Object widget

The Portal Object widget displays key information of a record from the tables available on your ServiceNow® instance. Additionally, your users can take related actions on the selected record.

The Portal Object widget enables you to display information from a specified table as cards on your portal. You can select any table from the ServiceNow® instance. The widget displays information based on the sys_id of the record. It also displays a list of actions your user can take on the selected record.

The Portal Object widget currently supports both desktop and mobile versions.

Portal Object widget



For more information about how to configure the Portal Object widget, see Add and configure the Portal Object widget.

Add and configure the Portal Object widget

Add a Portal Object widget to your portal and modify its data and behavior. You can use the Portal Object widget to display important information and actions related to records from a defined table on your portal homepage.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

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If you haven't already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

About this task

The Portal Object widget displays the information based on the sy_id entered in the widget instance options. If no sys_id is provided in the instance options, the widget uses the sys_id parameter provided in the URL.

Procedure

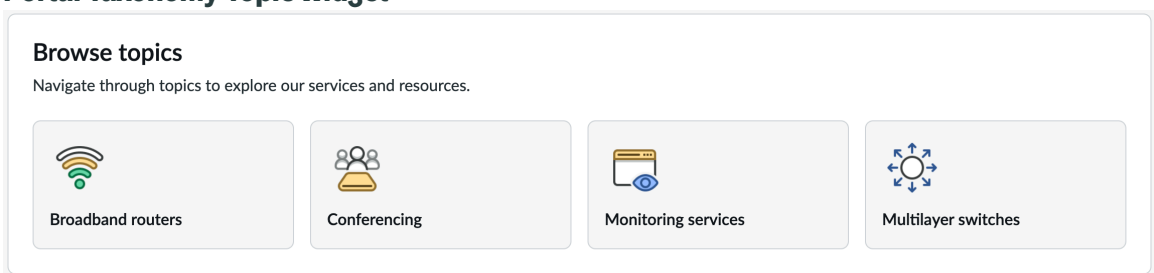
1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Object`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Object widget.
10. Enable editing of the widget by selecting the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Object widget instance options form.
12. Select **Save**.

Portal Taxonomy Topic widget

The Portal Taxonomy Topic widget displays topics as cards on your portal page. It enables your users to access knowledge articles and catalog items related to a topic displayed on your portal in a Portal Browse Taxonomy widget.

Display topic-related information to your users through cards displayed on your portal page that are defined through the Portal Browse Taxonomy widget. When a topic is selected on a card, your user is automatically redirected to a portal page that is defined when you configure a Portal Browse Taxonomy widget. This widget displays knowledge articles and catalog items related to the selected topic. You can display up to eight topics as cards.

Portal Taxonomy Topic widget



For more information, see Add and configure the Portal Taxonomy Topic widget.

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Add and configure the Portal Taxonomy Topic widget

Add a Portal Taxonomy Topic widget to your portal to display topics that your users can get more information about and modify its presentation and behavior. Once a topic card is selected, users are redirected to relevant knowledge articles and catalog items configured through the Portal Browse Taxonomy widget.

Before you begin

The UI Components for Customer Portals plugin must have been activated. For more information, see Activate the UI Components for Customer Portals plugin

If you have not already created the page to which you want to add the widget, see Create a page for Configurable Portal widgets.

Role required: sp_admin

Procedure

1. Navigate to the **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Designer**.
3. On the Service Portal Designer page, search for and select the page to which you want to add the widget.
4. Select the **Widgets** tab.
5. In the Layouts section, drag the Container layout onto the portal edit page.
6. On the container, add a set of columns by selecting the plus button ( ).
7. On the Widgets pane, in the **Filter Widget** field, enter `Portal Taxonomy Topic`.
8. Drag the widget onto the container.
9. In the Edit page, select the Portal Taxonomy Topic widget.
10. Enable editing the widget by selecting the Pencil icon ( ).
11. On the Instance form, fill in the fields.
    For a description of the field values, see Portal Taxonomy Topic widget instance options form.
12. Select **Save**.

What to do next

Configure a Portal Browse Taxonomy widget to work with the Portal Taxonomy Topic widget

Configure a Portal Browse Taxonomy widget to work with the Portal Taxonomy Topic widget

Enable users to access knowledge articles and catalog items in the Portal Taxonomy widget by selecting a topic on the card in the Portal Taxonomy Topic widget.

Before you begin

You must add and configure the Portal Browse Taxonomy widget before accessing taxonomic topic on the Portal Taxonomy Topic widget. Otherwise, a blank page displays on the Portal Taxonomy Topic widget. For more information, see Add and configure the Portal Browse Taxonomy widget.

You must add and configure the Portal Taxonomy Topic widget in your portal. For more information, see Add and configure the Portal Taxonomy Topic widget.

Role required: sp_admin

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Procedure

1. On your portal home page, in the website URL, copy the page ID.

```
https://<instance-url>/<portal-id>?id=<page-id>&sys_id=<reco
rd-id>
```

2. On you portal home page, press Control+right-click on the Portal Taxonomy Topic widget.
3. Select **Instance Options**.
4. On the Instance options window, in the Behavior section, paste the page ID into the **Browse taxonomy page** field.
5. Select **Save**.

Result

Selecting topics redirects the user to a Portal Browse Taxonomy widget that displays related knowledge articles and catalog items.

Configure Web Embeddables

Web Embeddables enables you to embed the ServiceNow components into external websites outside of the ServiceNow environment. You can use the default components or create your own custom components to interact with the ServiceNow platform, using dedicated APIs that allow for real-time data exchange and functionality without requiring users to directly access the ServiceNow instance.

The Web Embeddables homepage displays modules, components, and provides an overview on how to configure and embed components. It also shows Frequently Asked Questions that provide insights into the most common queries asked by users.

Web Embeddables overview

https://player.vimeo.com/video/1182693171?h=f0236ab319&badge=0&autopause=0&player_id=0&app_id=58479
You can configure and embed the following ServiceNow components on the third-party websites.

- Case list: Displays a comprehensive list of multiple cases along with their key details.
- Case view: Displays a detailed view of all case-related activities. Case view component includes a process tab that displays relevant playbooks when they are created for the case record
- Case create: Displays a form that helps you to create a case to address any issues related to products and services.
- Catalog item: Displays a form that you can fill in to request an item or service.
- Knowledge article view: Displays knowledge articles along with key details like title, content, author, view count, read time, and others. You can also rate the article and switch the language as per your preferred locale.
- Data visualization: Display a graphical representation of information from any ServiceNow table using visual elements such as single score, pie chart, donut and semi donut.
- Playbook intake: Enable users to submit cases using Playbook's guided experience. Systematically capture case details and display stages and activities involved in resolving the case.

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- Catalog browse: Allows you to browse and search catalog items from different catalogs and categories within a third-party website.
- Object list: Enables you to display records from different tables with their related actions in a list format.

Web Embeddables end-to-end flow

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Activate Web Embeddables

You can enable the ServiceNow Components for Customer Service (sn_cx_components), Web Components for Guest (sn_guest_component), and Web Embeddable Core (sn_embeddable_core) to enable Web Embeddables on your instance. The application establishes related plugins if they aren't already installed.

Before you begin

Role required: None

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Web Embeddables

Several types of components are installed with the activation of Web Embeddables, including tables, user roles, and scheduled jobs.

Roles installed

Granular roles installed with Web Embeddables

Role	Description	Contains roles
Web Embeddables admin [sn_embeddable_core.emb_admin]	Allows access to Web Embeddables for admin experience to configure component and get embed code. You can also configure the CORS rules.	• [cors_rule_admin] • [sn_ace.ace_user]

Properties installed with Web Embeddables

Configure the properties available with Web Embeddables. Properties are added with the activation of the Web Embeddables plugin.

All system properties are located in the System Properties [sys_properties] table. To access table, navigate to **All** > **System properties** or enter `sys_properties.list` in the navigation filter.

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Property	Description
[glide.uxf.lib.embeddables.enabled]	Enables the rendering of web components and assets in an embeddables context. You must enable this sys property to allow Web Embeddables to function on third-party website. By default, the property is set to true.
[sn_cb_experiences.uib.enable.cb]	Enables the component builder experience in UI Builder. By default, the property is set to true.

Set up Web EmbeddablesWeb Embeddable

Learn how to set up the Web Embeddables on your ServiceNow instance.

Configure the ServiceNow component instance

Configure the component instance so that your user can embed the components onto their website to access component-related data in real-time.

Before you begin

You must have the following setup to configure ServiceNow component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables
- Set up a custom URL as the instance URL
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

About this task

This procedure outlines the high-level steps that you must follow to set up Web Embeddables component instance.

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the Homepage, select **Create module** or use the existing module.
   For more information on how to create a new module, see Create a module.
3. On the module page, in the Components tab, create a group and add a component instance.
   For more information on how to create a group and then add a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: The Show static preview option isn't available for Data visualization component.

5. Configure the component instance properties.
   The Preview tab displays real-time data according to choices set in the component properties.
6. Select the **CORS rules** tab to configure the CORS rules.

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For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.

7. Select **Component** tab.
8. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code must be added once to your third-party website.
10. In the Component code tab, review the generated code and select the **Copy component code**.
11. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

   Note: Enabling the event handler also modifies the component code.

Result

The global and component codes are ready to be shared with the third-party admin to embed component instance on their third-party webpage.

What to do next

Embed ServiceNow components instance on the third-party website

Test the ServiceNow components in a sandbox environment

Enables you to test the ServiceNow components on your sandbox instance without setting up a custom URL and authentication. It isn't recommended to use this method for production or non-production instance.

Set up a custom URL as the instance URL

Add a custom URL to your instance configuration to use instead of your ServiceNow URL. This custom URL ensures that embedded components remain accessible in your browser, even when third-party cookies are turned off.

Before you begin

- You must Activate the custom URL plugin. For more information, see Activate custom URLs.
- You must purchase or register a URL before adding the custom URL to your instance.

Role required: admin

Procedure

1. Navigate to **All** > **Custom URL** > **Custom URLs**.
2. You should either:
   - Select New to associate a new domain name that is new to your instance.
   - Select a custom URL that has already been set up as your instance URL.
3. On the form, fill in the fields.

Custom URL fields

Field	Description
Domain Name	Fully qualified domain name (FQDN) of the custom URL. The FQDN is a CNAME redirect created in the name server record for the custom domain.

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Field	Description
	Note: For example, in the name server for acme.com, you might create an entry: `support.acme.com 300 IN CNAME acme.servicenow.com`
Is Instance URL	Option to enable this custom URL for all outbound URLs. Only one active custom URL can be the instance URL. To enable this setting for a custom URL, select **Set as Instance URL** on the URL record. Any previous custom URLs are then removed. **Note:** If you set this as the instance URL, it automatically replaces any previously set custom URL that was used as the instance URL.
Status	Displays the status of the custom URL record. If the status is **Active**, the custom URL is provisioned and ready to use.
Service Portal	Service portal that you want to use when you redirect users to your instance using the custom URL.
Identity Provider	Identity Provider for the custom URL enables you to allow users to auto-redirect to specified IdPs defined at the custom URL record.

A custom URL should activate within several hours on your instance.

Note:

- You must delete the custom URL record from ServiceNow instance first and then delete any Domain Name Server (DNS) entries from the DNS server.
- Any deletion of a DNS entry from DNS server prior to deletion of custom URL record from ServiceNow instance results in blocking the deletion of other corresponding custom URL records from ServiceNow.

Authenticate the ServiceNow components using OIDC

Set up auto-login and log out using OpenID Connect (OIDC) authentication to enable single and simultaneous login and logout in your website and embedded components.

Before you begin

You must use the default global code to enable login and logout functions on your ServiceNow instance.

Role required: sn_embeddable_core.emb_admin

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About this task

Once the embeddable components are integrated into your website, you're automatically logged in to the ServiceNow instance when you access the website. Ensuring a secure and personalized experience. Similarly, logging out of the website should also log you out of the ServiceNow instance.

Note: The Identity Provider (IdP) application used on your website must be configured on ServiceNow® as well.

Procedure

1. Configure an OIDC IdP (Identity Provider) on your ServiceNow instance.

   Note:

   - For more information, see Multi-Provider single sign-on (SSO).
   - The OIDC IdP should match the IdP that you use to log in to the website.

2. Synchronize user records on the IdP with your ServiceNow instance.
   Verify that each website user is registered on the IdP and ServiceNow instance.
3. Implement code on the third-party website to trigger the login() and logout() functions for automatic login and logout.
   a. Use the login() function to authenticate the session on embedded components when you log in using IdP into the website.
   b. Use the logout() function to log out from an ServiceNow instance.

Result

Auto-login and logout functions are configured and trigger each time you log in or log out from the ServiceNow instance and third-party website.

Non OIDC authentication for ServiceNow components

Generate a JSON Web Token (JWT) token to authenticate your ServiceNow components if your website doesn't use OpenID Connect (OIDC) authentication.

Note: You can test ServiceNow components on your sandbox instance without setting up authentication. For more information, see Test the ServiceNow components in a sandbox environment.

Setting up a JWT token in the ServiceNow instance

The token must be in JWT format with a user identifier. Create a OAuth Entity record and include the third party's well-known configuration to validate the token signature on the ServiceNow instance.

Setting up a JWT token with public keys from a third-party website

A JWT token can be created on your third-party website. It's validated if the third party provides the public key used for the token's signature using a JSON Web key Set (JWKS) URI and a well-known configuration URL.

To achieve this, two public URLs can be created. The first URL can provide the public key information. The second URL serves as the metadata or well-known configuration URL, referencing the URL of the public key under the `jwks_uri` attribute. Once these URLs are set up, ServiceNow instance can be configured to accept third-party tokens generated by a third-

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party OIDC provider. For more information, see Configure an OAuth OIDC provider for accepting third-party token.

Setting up JWT token with public key hosting on ServiceNow

A JWT token can also be issued from a third-party site. If you're unable to provide a JWKS URI and a well-known configuration, an alternative involves uploading the public key directly to the ServiceNow instance. Additionally, public-scripted REST APIs can be implemented to replicate the output of a well-known configuration endpoint. In such cases, the public key must be accessible through a public-scripted REST endpoint within the ServiceNow instance.

Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components

Configure a CORS rule to enable cross-domain requests between ServiceNow components and the website that you want to embed the web components.

Before you begin

You must have the following setup in to configure CORS rules for components:

- You must activate the ServiceNow components. For more information, see Activate Web Embeddables.
- At least one ServiceNow component configured on your instance.

Role required: admin

About this task

You can use the existing CORS rules to enable secure communication between ServiceNow components and the external website. You can also set up a CORS rule so that ServiceNow components are able to make cross-origin requests to retrieve dynamic translations. For more information on creating and defining CORS rules, see Define a CORS rule.

Procedure

1. Navigate to **All** > **Web Embeddables** > **Configure** > **CORS rules**.
2. In the **Domain name** field, enter the domain name that you want to embed the component.
3. Select **Check status**.
   Displays all the CORS rules that must be configured. It shows both configured and unconfigured URLs.
4. Select **Configure CORS rules**.
   Initiates CORS rules for all the unconfigured URLs.

   Note: The confirmation message CORS `rules configured successfully` appears.

Result

The domain name that you've entered is configured with CORS rules and can be used to embed the component.

Related topics

Define a CORS rule

Configure module in Web Embeddables

A module is a collection of component instances tied to specific domains or deployment contexts.

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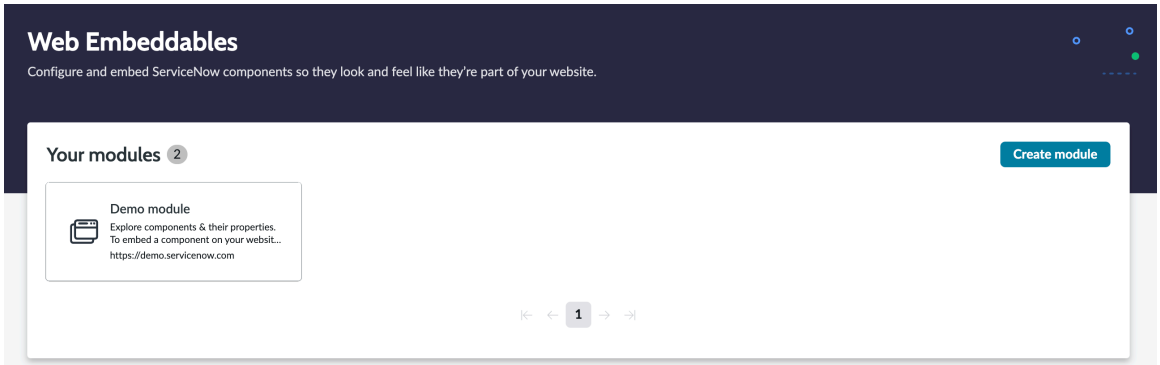
A module represents a website with a collection of pages or a section using groups and a collection of components instances embedded on the website. The theme for component instances, external domain URL for CORS, and custom ServiceNow domain for base URL are derived from module meta data.



Create a module

Create a module to manage component instances used in a website. You can either create a module or use a prebuilt module and edit it according to requirement.

Before you begin

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. Select **Create module**.
   A dialog box appears for data entry.
3. Enter the following field values.

Field	Description
Name	Name of a module.
Description	Description of a module.
External domain	The domain where you want to embed the ServiceNow components. **Note:** If you update this field, review the configuration status of CORS rules and reconfigure them if necessary.
ServiceNow custom domain	Custom domain for your ServiceNow instance. The instance where the ServiceNow components are configured. **Note:** If you update this field, copy and paste the updated global code on your webpages.
Theme	The theme of the module. Selected theme is applied to all components embed on third-party website. You can select a theme from the list. By default, it is set to Coral. For more information on theme, Create a theme with Theme Builder.

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Field	Description
Icon	Thumbnail image of a module. User can see this thumbnail when browsing modules from the Web Embeddables admin Experience.

4. Select **Create module**.
   A module is created and appears on your Web Embeddables home page under **Your module** section. Additionally, a default group named Group 1 is automatically created for your module and is visible in the **Components** tab.
5. **Optional:** On the module page, select the **Edit** to modify the details.
6. **Optional:** Select Show module action ··· icon to delete the module.

   Note: This action permanently deletes the module and its component instances, and this action can't be undone. Existing component instances on your website will continue to function. To remove those instances, delete or comment out the embed codes on your webpages.

Create a group and add a component instance

Create a group to model third-party website structure such as page or sections. Use the default group or create new groups to manage the component instances on that page or section.

Before you begin

You must create a module. For more information, see Create a module.

Role required: sn_embeddable_core.emb_admin

About this task

You can create multiple groups for the same module and include different component instances. When you create a module, a default group called **Group 1** is automatically added to the **Components** tab. Additionally, you can delete the group, rename the group title, and rearrange the group position by simply dragging and dropping them. If you delete the group, it will permanently remove the group and its component instances from the module, and it cannot be undone. However, existing component instances on your website will remain functional. To remove the components from your website, delete or comment out the embed code on your webpage.

Similar to groups, you can also clone, delete, and rename component instances and move them between different groups by simply dragging and dropping. Additionally, if you delete, it will permanently remove the component instance from this module, and it cannot be undone. However, existing instances on your website will remain functional. To remove the component from your website, delete or comment out the embed code on your webpage.

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. On Your modules section, select module.
3. On the module page, in the **Component** tab, select **Add group**.

   Note: A Group 2 is created and appears in the **Component** tab.

4. Select Group 2 (>) icon.

   Note: A pop-up window appears, displaying all the components for which you can create component instances.

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5. Select **Add component**.
6. Select a component.
   A new component instance is created and appears in Group 2.
7. Configure the component instance properties.

Configure web components

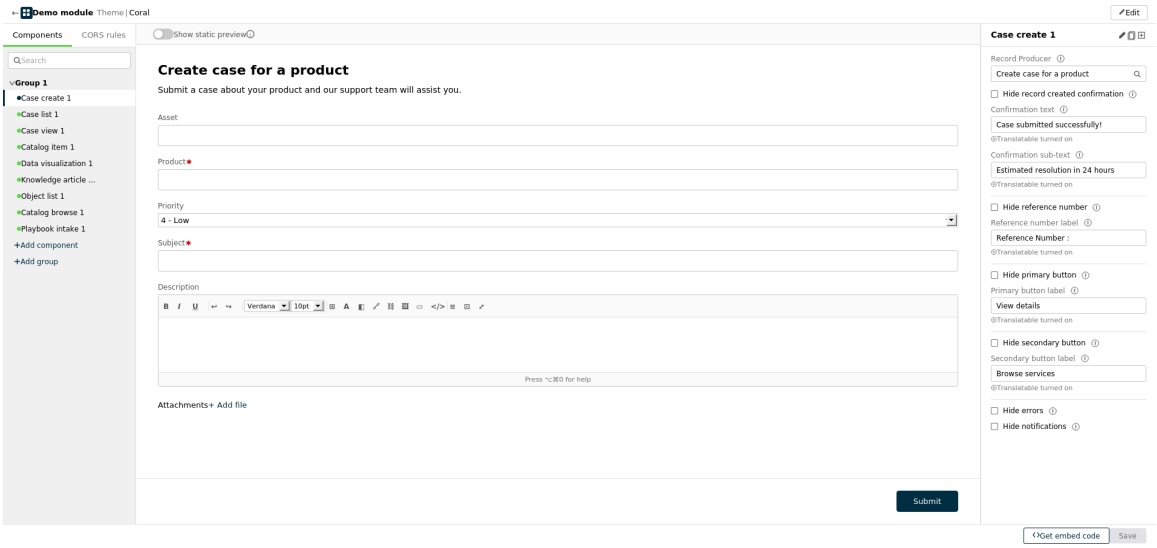
Understand how to configure ServiceNow web components on your instance.

Case create component

Enables you to create a case to address any issues related to products and services. You can submit new cases, providing all necessary details such as assets, product, description, urgency, and more, directly from your website. Once the case is created, you can access it in the Case list component.

Note: Case create component supports a mobile adaptive layout.

Case create component



Configure the Case create component instance

Configure the Case create component instance so that your users can embed it within their website to address any issues related to product and services from their website directly.

Before you begin

You must have the following setup to configure the Case create component:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

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Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Case create component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component instance when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Case create component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Case create component instance, see Component properties for the Case create.
6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select the **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select the **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code must only be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
```

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```
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();

/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handlers in the Case create component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Case create 1
-->
<sn-embedx-case-form
 sys-id="de45c412c312310015519f2974d3ae1b"
 confirmation-text="Case submitted successfully!"
 confirmation-sub-text="Estimated resolution in 24 hours"
 reference-number-label="Reference Number :"
 primary-button-label="View details"
 secondary-button-label="Browse services">
</sn-embedx-case-form>
<!--
 The component also includes the following additional
 properties:
 hide-reference-number
 hide-primary-button
 hide-secondary-button
 hide-record-created-confirmation
 hide-errors
 hide-notifications
-->
```

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```
<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxCaseForm =
 document.querySelector('sn-embedx-case-form');

 /* Uncomment this code for the default behaviour of the Case
 create component.

 // Get the record producer record id from the current URL.
 // Optionally, get query to pre fill the form.
 const currentURL = new URL(window.location.href);
 const urlParams = new URLSearchParams(currentURL.search);
 const product = urlParams.get('emb_product');
 // Update the sysId of the component property.
 // Optionally, update the prefill fields property
 const prefillConfig = {
  product: product
 };
 setProperties(snEmbedxCaseForm,{
  prefillFields: prefillConfig
 });
*/

 getEmbeddables(["sn-embedx-case-form"]);

 const eventHandlers = {
  'SN_EMBEDX_CASE_FORM#COMPONENT_ERROR' : (e) => {
   // This event is dispatched when a property validation or
 internal error occurs.
   var {errorMessage, errorType} = e.detail.payload;
   console.log(errorMessage, errorType);
  },
  'SN_EMBEDX_CASE_FORM#COMPONENT_READY' : (e) => {
   // This event is dispatched when a component is ready and
 usable.
  },
  'SN_EMBEDX_CASE_FORM#BUTTON_CLICKED' : (e) => {
   // This event is dispatched if any button is clicked on the
 confirmation message.
   var {table, record_sys_id, button_variant} =
 e.detail.payload;
   var primaryURL =  '/caseview'; // Replace with the URL of
 the case view page
   var secondaryURL = '/browse'; // Replace with the URL of the
 secondary page

   if(button_variant == 'primary') {
    // Construct the URL for the Case View component with URL
 parameters
    const caseViewURL =
 primaryURL+'?emb_table='+table+'&emb_recordid='+record_sys_id;
    open(caseViewURL,'_self'); // Open case record when primary
 button is clicked
   }
```

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```
    else {
     // Open the Case View component in the same tab
     open(secondaryURL,'_self');
    }
   },
   'SN_EMBEDX_CASE_FORM#RECORD_CREATION_SUCCEEDED' : (e) => {
    // This event is dispatched if the record was successfully
 created.
    var {table, record_sys_id} = e.detail.payload;
    console.log(table, record_sys_id);
   },
   'SN_EMBEDX_CASE_FORM#RECORD_CREATION_FAILED' : (e) => {
    // This event is dispatched if the record creation has
 failed.
   },
   'SN_EMBEDX_CASE_FORM#COMPONENT_NOTIFICATION_SENT' : (e) => {
    // This event is dispatched when the component provides a
 notification for the end user.
    var {items} = e.detail.payload;
    console.log(items);
   }
 };

 setEvents(snEmbedxCaseForm, eventHandlers);
</script>
```

Result

The global and component codes are ready to be shared with the third-party administrator to embed the Case create component instance on their third-party website.

What to do next

Embed the Case create component instance on the third-party website

Related topics

- Component properties for the Case create
- Event handlers in the Case create component
- Sample code for the Case create component

Embed the Case create component instance on the third-party website

Embed the global code and component code of the Case create component instance that you configured so that you can enable your customers to start using the Case create component instance on your third-party website.

Before you begin

You must configure the Case create component instance. For information, see Configure the Case create component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only must be added once to your third-party website.

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2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded component to verify that it launches the Case create component instance.

Result

The Case create component instance appears on your third-party website.

Sample code for the Case create component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'SN_EMBEDX_CASE_FORM#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a property validation or
 internal error occurs.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

},

'SN_EMBEDX_CASE_FORM#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

},

'SN_EMBEDX_CASE_FORM#BUTTON_CLICKED' : (e) => {

// This event is dispatched if any button is clicked on the
 confirmation message.

var {table, record_sys_id, button_variant} = e.detail.payload;

var primaryURL = '/caseview'; // Replace with the URL of the
 case view page

var secondaryURL = '/browse'; // Replace with the URL of the
 secondary page



if(button_variant == 'primary') {

// Construct the URL for the Case view component with URL
 parameters

const caseViewURL =
 primaryURL+'?emb_table='+table+'&emb_recordid='+record_sys_id;
```

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```
open(caseViewURL,'_self'); // Open case record when primary
 button is clicked

}

else {

// Open the Case View component in the same tab

open(secondaryURL,'_self');

}

},

'SN_EMBEDX_CASE_FORM#RECORD_CREATION_SUCCEEDED' : (e) => {

// This event is dispatched if the record was successfully
 created.

var {table, record_sys_id} = e.detail.payload;

console.log(table, record_sys_id);

},

'SN_EMBEDX_CASE_FORM#RECORD_CREATION_FAILED' : (e) => {

// This event is dispatched if the record creation has failed.

},

'SN_EMBEDX_CASE_FORM#COMPONENT_NOTIFICATION_SENT' : (e) => {

// This event is dispatched when the component provides a
 notification for the end user.

var {items} = e.detail.payload;

console.log(items);

}
```

Related topics

- Configure the Case create component instance
- Embed the Case create component instance on the third-party website
- Event handlers in the Case create component
- Component properties for the Case create

Case list component

Display a comprehensive list of multiple cases along with their key details to help you manage and act on any case. Once you select any case, you can see the details of the case in the Case View component.

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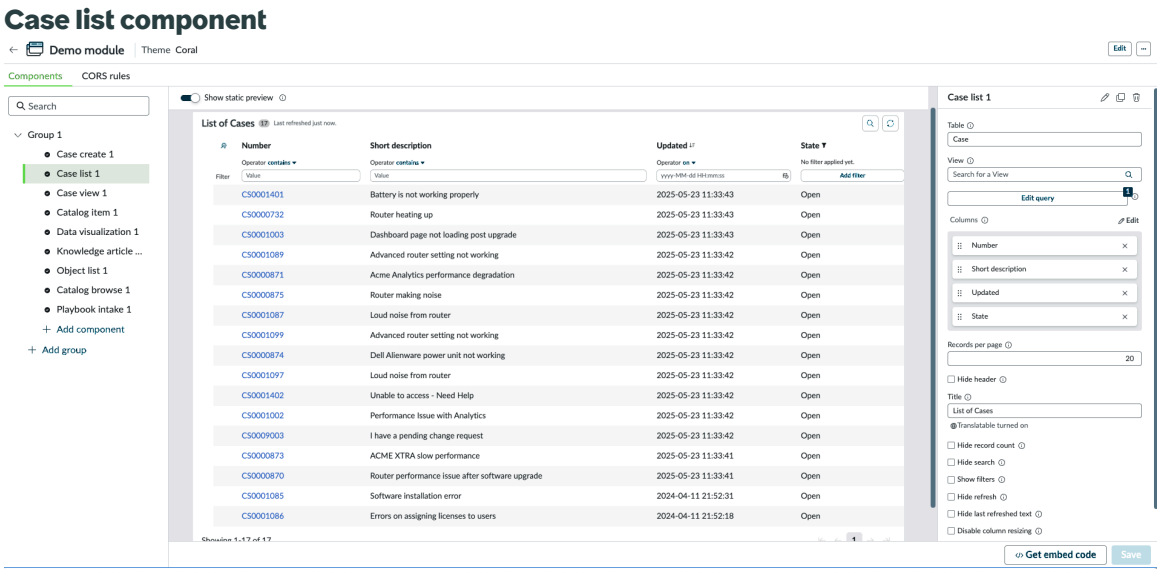
Each case in the case list can include details such as the case number, the customer's name, short description, status, and opened. You can also add other columns using component properties.

Note: The Case list component can show the records from any extended table of case or task table.



Configure the Case list component instance

Configure the Case list component instance so that your user can embed it on their website to access the list of all cases from their website directly.

Before you begin

You must have the following setup to configure the Case list component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Case list component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

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5. Configure the Case list component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Case list component instance, see Component properties for the Case list.
6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code only must be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();
```

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```
/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handler in the Case list component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Case list 1
-->
<sn-embedx-case-list
 table="sn_customerservice_case"
 limit="20"
 list-title="List of Cases"
 query="state=10"
 columns="number,short_description,sys_updated_on,state">
</sn-embedx-case-list>
<!--
 The component also includes the following additional
 properties:
 hide-header
 hide-last-refreshed-text
 hide-record-count
 hide-search
 hide-refresh
 show-filters
 hide-when-empty
 disable-column-resizing
 hide-errors
 view
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxCaseList =
 document.querySelector('sn-embedx-case-list');

 getEmbeddables(["sn-embedx-case-list"]);

 const eventHandlers = {
  'SN_EMBEDX_CASE_LIST#RECORD_SELECTED' : (e) => {
   // This event is dispatched when a record is selected.
   var {table, record_sys_id} = e.detail.payload;
```

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```
    // the logic to construct the URL for the Case View
 component. Add your portal URL here.
    const caseViewURL =
 '/caseview?emb_table='+table+'&emb_recordid='+record_sys_id;
    // Redirect to the Case View component page
    open(caseViewURL,'_self');
   },
   'SN_EMBEDX_CASE_LIST#COMPONENT_READY' : (e) => {
    // This event is dispatched when a component is ready and
 usable.
   },
   'SN_EMBEDX_CASE_LIST#COMPONENT_ERROR' : (e) => {
    // This event is dispatched when a property validation or
 internal error occurs.
    var {errorMessage, errorType} = e.detail.payload;
    console.log(errorMessage, errorType);
   }
 };

 setEvents(snEmbedxCaseList, eventHandlers);
</script>
```

Result

The global and component codes are ready to be shared with the third-party administrator to embed the Case list component instance on their third-party website.

What to do next

Embed the Case list component instance on the third-party website

Related topics

Component properties for the Case list

Event handler in the Case list component

Sample code for the Case list component

Embed the Case list component instance on the third-party website

Embed the global code and component code of the Case list component instance that you configured so that you can enable your customers to start using the Case list component instance on your third-party website.

Before you begin

You must configure the Case list component in your instance. For more information, Configure the Case list component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only needs to be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded the component to verify that it launches the Case List component instance.

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Result

The Case list component instance appears on your third-party website.

Sample code for the Case list component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'SN_EMBEDX_CASE_LIST#RECORD_SELECTED' : (e) => {

// This event is dispatched when a record is selected.

var {table, record_sys_id} = e.detail.payload;

// the logic to construct the URL for the Case View component.
 Add your portal URL here.

const caseViewURL =
 '/caseview?emb_table='+table+'&emb_recordid='+record_sys_id;

// Redirect to the Case view component page

open(caseViewURL,'_self');

},

'SN_EMBEDX_CASE_LIST#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

},

'SN_EMBEDX_CASE_LIST#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a property validation or
 internal error occurs.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

}
```

Related topics

Configure the Case list component instance

Embed the Case list component instance on the third-party website

Component properties for the Case list

Event handler in the Case list component

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Case view component

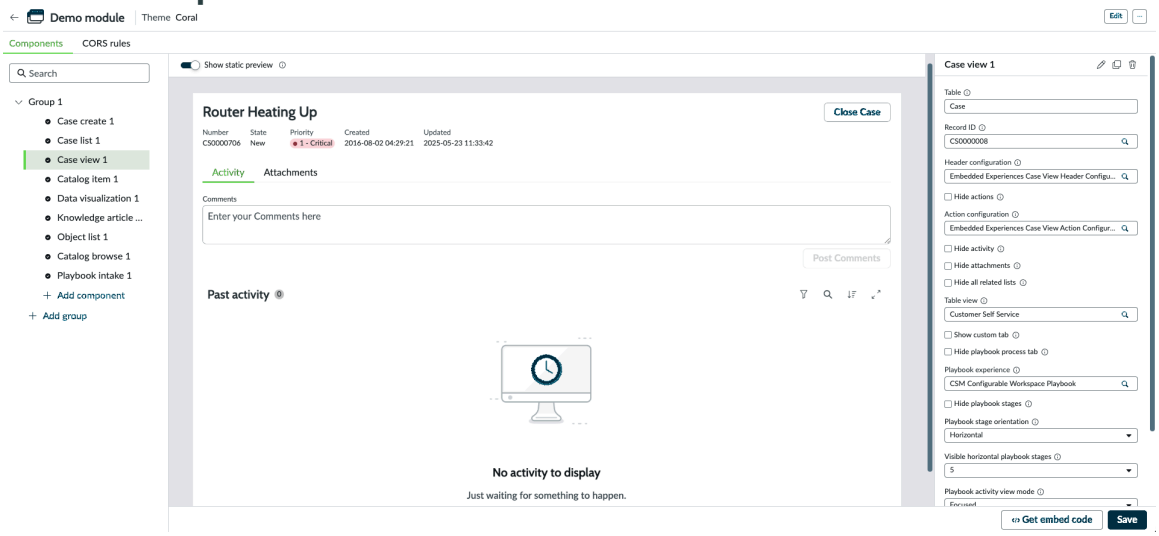
Displays a detailed view of all case-related activities that help you to make effective decisions and act on a case. It also displays an activity tab and an attachments tab for case management.

You can enable playbook guided experience in the Case view component within a case record. When enabled, it adds a process tab that displays relevant playbooks for the case record. Enabling a playbook streamlines complex workflows, confirming users follow a predefined series of steps to resolve any case.

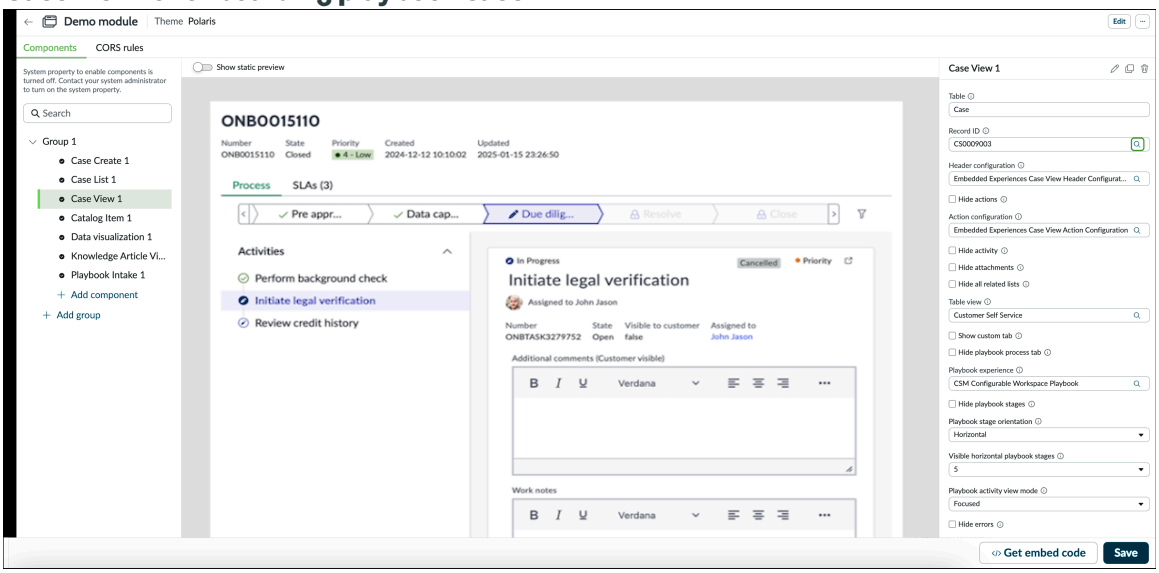
The Case view component includes essential case details such as case number, status, priority, created on, and last updated.

Note: This component can show the records from any extended table of case or task table.

Case view component



Case view for onboarding playbook case



Configure the Case view component instance

Configure the Case view component instance so that your user can embed it on their website to access the case-related activities on their website directly.

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Before you begin

You must have the following setup to configure the Case view component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Case view component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Case view component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Case view component instance, see Component properties for the Case view.
6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code only must be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
```

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```
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();

/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handler in the enhanced Case view component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes configuration for event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Case view 1
-->
<sn-embedx-case-view
 table="sn_customerservice_case"
 table-view-for-related-list="4006fee3d7600200e5982cf65e6103de"
 header-configuration-id="1db45f9118520210f8775b8843daf927"
 action-configuration-id="b226535518520210f8775b8843daf9fb"
 playbook-stage-orientation="horizontal"
```

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```
 visible-horizontal-playbook-stages="5"
 playbook-activity-view-mode="focused"
 sys-id="aa5ca024d7700200e5982cf65e61030e">
</sn-embedx-case-view>
<!--
 The component also includes the following additional
 properties:
 hide-activity
 hide-attachments
 hide-actions
 hide-all-related-lists
 show-custom-tab
 hide-errors
 hide-playbook-process-tab
 selected-playbook-context-id
 selected-stage-context-id
 selected-activity-context-id
 hide-playbook-stages
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxCaseView =
 document.querySelector('sn-embedx-case-view');

 /* Uncomment this code for the default behaviour of the Case
 View component.

 // Get the record id and table from the current URL for a
 standard case.
 // Optionally, get playbook experience ID, playbook context
 ID, stage context ID,
 // and activity context ID for playbook case.
 const currentURL = new URL(window.location.href);
 const urlParams = new URLSearchParams(currentURL.search);
 const tableName = urlParams.get('emb_table');
 const sysRecordId = urlParams.get('emb_recordid');
 const playbookExperience =
 urlParams.get('emb_playbook_experience');
 const playbookContextId =
 urlParams.get('emb_playbook_context_id');
 const stageContextId = urlParams.get('emb_stage_context_id');
 const activityContextId =
 urlParams.get('emb_activity_context_id');

 // Update the sysId and table properties of the
 componentProperties object.
 // Optionally, update the playbook experience ID, playbook
 context ID,
 // stage context ID, and activity context ID for the playbook
 case view as well.
 setProperties(snEmbedxCaseView,{
  table:tableName,
  sysId:sysRecordId,
```

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```
 playbookExperience:playbookExperience,
 selectedPlaybookContextId:playbookContextId,
 selectedStageContextId:stageContextId,
 selectedActivityContextId:activityContextId
});
*/

getEmbeddables(["sn-embedx-case-view"]);

const eventHandlers = {
 'SN_EMBEDX_CASE_VIEW#COMPONENT_READY' : (e) => {
  // This event is dispatched when a component is ready and
usable.
 },
 'SN_EMBEDX_CASE_VIEW#COMPONENT_ERROR' : (e) => {
  // This event is dispatched when a property validation or
internal error occurs.
  var {errorMessage, errorType} = e.detail.payload;
  console.log(errorMessage, errorType);
 },
 'SN_EMBEDX_CASE_VIEW#CASE_COMMENT_ADDED' : (e) => {
  // This event is dispatched when a comment is added in the
activity stream.
 }
};

setEvents(snEmbedxCaseView, eventHandlers);
</script>
```

Result

The global and component codes are ready to be shared with the third-party administrator to embed the Case view component instance on their third-party website.

What to do next

Embed the Case view component instance on the third-party website

Embed the Case view component instance on the third-party website

Embed the global code and component code of the Case view component instance that you configured so that you can enable your customers to start using the Case view component instance on your third-party website.

Before you begin

You must configure the Case view component instance. For information, see. Configure the Case view component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

Note: The global code only must be added once to your third-party website.

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2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded component to verify that it launches the Case view component instance.

Result

The Case view component instance appears on your third-party website.

Sample code to handle the Case view component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'SN_EMBEDX_CASE_VIEW#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

},

'SN_EMBEDX_CASE_VIEW#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a property validation or
 internal error occurs.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

},

'SN_EMBEDX_CASE_VIEW#CASE_COMMENT_ADDED' : (e) => {

// This event is dispatched when a comment is added in the
 activity stream. }
 };

 setEvents(snEmbedxCaseView, eventHandlers);
</script>
```

Related topics

Configure the Case view component instance

Embed the Case view component instance on the third-party website

Component properties for the Case view

Event handler in the enhanced Case view component

Catalog item component

Displays a form to request an item or service from your third-party website. A catalog item may be available in more than one catalog and category. After submitting the form, a request is created for an approver to approve or reject.

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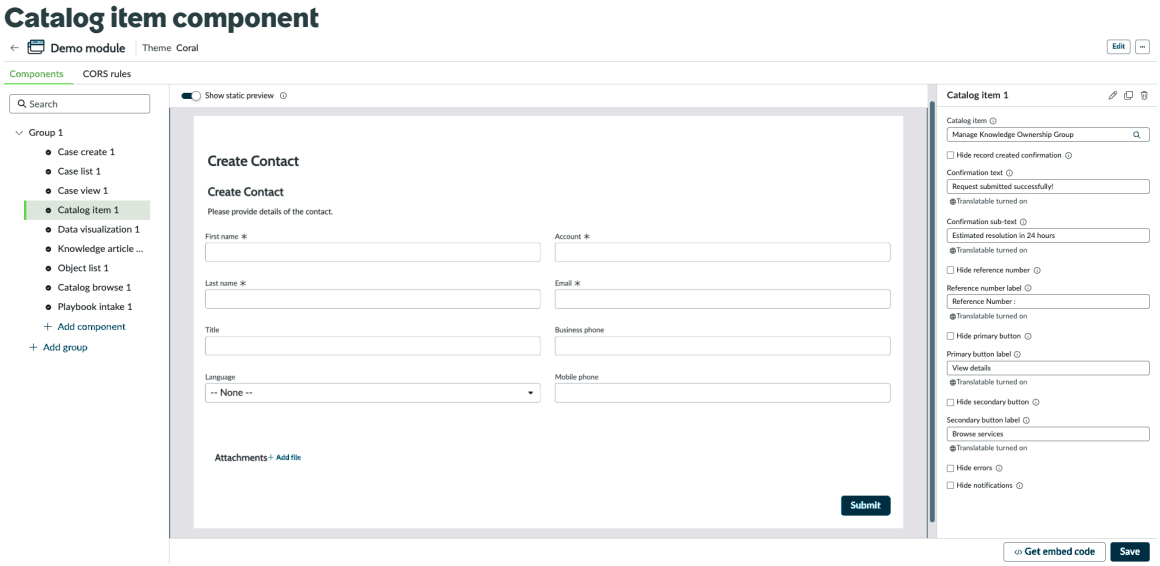
Note: Catalog item component supports a mobile adaptive layout.



Configure the Catalog item component instance

Configure the Catalog item component instance so that your users can embed it on their website to request an item or service from their website.

Before you begin

You must have the following setup to configure the Catalog item component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a module, see Create a module.
3. On the module page, in the Components tab, add a Catalog item component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Catalog item component instance properties.

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- The Preview tab displays real-time data according to choices set in the component properties.
- For a description of the component properties related to the Catalog item component instance, see Component properties for the Catalog item.

6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select the **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select the **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code must only be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();
```

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```
/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handler in the Catalog item component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Catalog item 1
-->
<sn-embedx-catalog-item-form
 sys-id="56c62944c30102003d3b7bfaa2d3ae36"
 confirmation-text="Request submitted successfully!"
 confirmation-sub-text="Estimated resolution in 24 hours"
 reference-number-label="Reference Number :"
 primary-button-label="View details"
 secondary-button-label="Browse services">
</sn-embedx-catalog-item-form>
<!--
 The component also includes the following additional
 properties:
 hide-reference-number
 hide-primary-button
 hide-secondary-button
 hide-record-created-confirmation
 hide-errors
 hide-notifications
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxCatalogItemForm =
 document.querySelector('sn-embedx-catalog-item-form');

 /* Uncomment this code for the default behaviour of the
 Catalog item component.

 // Get the catalog item record id from the current URL.
 // Optionally, get query to pre fill the form.
 const currentURL = new URL(window.location.href);
 const urlParams = new URLSearchParams(currentURL.search);
 const account = urlParams.get('emb_account');
 const preferred_language =
 urlParams.get('emb_preferred_language');
```

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```
 // Update the sysId of the component property.
 // Optionally, update the prefill fields property
 const prefillConfig = {
   account: account,
   preferred_language: preferred_language
 };
 setProperties(snEmbedxCatalogItemForm,{
  prefillFields: prefillConfig
 });
*/

 getEmbeddables(["sn-embedx-catalog-item-form"]);

 const eventHandlers = {
  'SN_EMBEDX_CATALOG_ITEM_FORM#RECORD_CREATION_FAILED' : (e) =>
 {
   // This event is dispatched if the record creation has
 failed.
  },
  'SN_EMBEDX_CATALOG_ITEM_FORM#COMPONENT_NOTIFICATION_SENT' :
 (e) => {
   // This event is dispatched when the component provides a
 notification for the end user.
   var {items} = e.detail.payload;
   console.log(items);
  },
  'SN_EMBEDX_CATALOG_ITEM_FORM#COMPONENT_READY' : (e) => {
   // This event is dispatched when a component is ready and
 usable.
  },
  'SN_EMBEDX_CATALOG_ITEM_FORM#RECORD_CREATION_SUCCEEDED' : (e)
 => {
   // This event is dispatched if the record was successfully
 created.
   var {table, record_sys_id} = e.detail.payload;
   console.log(table, record_sys_id);
  },
  'SN_EMBEDX_CATALOG_ITEM_FORM#BUTTON_CLICKED' : (e) => {
   // This event is dispatched if any button is clicked on the
 confirmation message.
   var {table, record_sys_id, button_variant} =
 e.detail.payload;
   var primaryURL =  '/caseview'; // Replace with the URL of
 the case view page
   var secondaryURL = '/browse'; // Replace with the URL of the
 secondary page

   if(button_variant == 'primary') {
    // Construct the URL for the Case View component with URL
 parameters
    const caseViewURL =
 primaryURL+'?emb_table='+table+'&emb_recordid='+record_sys_id;
    open(caseViewURL,'_self'); // Open case record when primary
 button is clicked
   }
   else {
    // Open the Case View component in the same tab
```

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```
    open(secondaryURL,'_self');
   }
  },
  'SN_EMBEDX_CATALOG_ITEM_FORM#COMPONENT_ERROR' : (e) => {
   // This event is dispatched when a property validation or
 internal error occurs.
   var {errorMessage, errorType} = e.detail.payload;
   console.log(errorMessage, errorType);
  }
 };

 setEvents(snEmbedxCatalogItemForm, eventHandlers);
</script>
```

Result
The global and component codes are ready to be shared with the third-party administrator to embed the Catalog item component instance on their third-party website.

What to do next
Embed the Catalog item component instance on the third-party website

Related topics

Component properties for the Catalog item

Event handler in the Catalog item component

Sample code for the Catalog item component

Embed the Catalog item component instance on the third-party website

Embed the global code and component code of the Catalog item component instance that you configured so that you can enable your customers to start using the Catalog item component instance on your third-party website.

Before you begin
You must configure the Catalog item component instance. For information, see Configure the Catalog item component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only must be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded web component to verify that it launches the Catalog item component instance.

Result
The Catalog item component instance appears on your third-party website.

Sample code for the Catalog item component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

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Sample code

```
{

'SN_EMBEDX_CATALOG_ITEM_FORM#COMPONENT_NOTIFICATION_SENT' : (e)
 => {

// This event is dispatched when the component provides a
 notification for the end user.

var {items} = e.detail.payload;

console.log(items);

},

'SN_EMBEDX_CATALOG_ITEM_FORM#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a property validation or
 internal error occurs.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

},

'SN_EMBEDX_CATALOG_ITEM_FORM#RECORD_CREATION_SUCCEEDED' : (e) =>
 {

// This event is dispatched if the record was successfully
 created.

var {table, record_sys_id} = e.detail.payload;

console.log(table, record_sys_id);

},

'SN_EMBEDX_CATALOG_ITEM_FORM#BUTTON_CLICKED' : (e) => {

// This event is dispatched if any button is clicked on the
 confirmation message.

var {table, record_sys_id, button_variant} = e.detail.payload;

var primaryURL = '/caseview'; // Replace with the URL of the
 case view page

var secondaryURL = '/browse'; // Replace with the URL of the
 secondary page



if(button_variant == 'primary') {
```

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```
// Construct the URL for the Case View component with URL
 parameters

const caseViewURL =
 primaryURL+'?emb_table='+table+'&emb_recordid='+record_sys_id;

open(caseViewURL,'_self'); // Open case record when primary
 button is clicked

}

else {

// Open the Case View component in the same tab

open(secondaryURL,'_self');

}

},

'SN_EMBEDX_CATALOG_ITEM_FORM#RECORD_CREATION_FAILED' : (e) => {

// This event is dispatched if the record creation has failed.

},

'SN_EMBEDX_CATALOG_ITEM_FORM#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

}
```

Related topics

Configure the Catalog item component instance

Embed the Catalog item component instance on the third-party website

Component properties for the Catalog item

Event handler in the Catalog item component

Data visualization component

Enables you to display a graphical representation of information from any ServiceNow table, using visual elements such as single score, pie chart, donut, and semi donut. Use this component to monitor activities related to cases, incidents, and so on, that can help you to take decisions based on the information shown.

Following are the visual elements which you can embed on your webpage to display information:

- Single score: A type of visualization that lets you create a single score visualization.
- Pie chart: Display individual data segments that are part of a whole. It helps you to compare different data pieces as they relate to each other.

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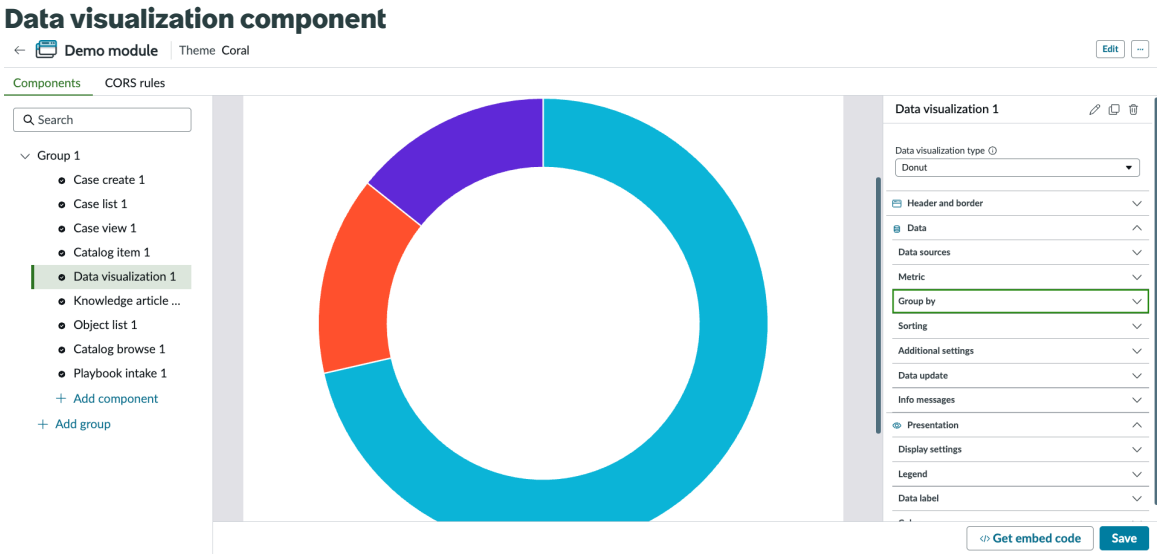
- Donut: Display information similar to a pie chart but includes an empty space at the center of data to display total value.
- Semi donut: Displays information in a 180-degree view and fits in a smaller area than a full donut chart.



Configure the Data visualization component instance

Configure the Data visualization component instance so that your users can embed it on their website to display information in the form of single score, pie chart, donut chart, or semi-donut chart directly from any ServiceNow table.

Before you begin

You must have the following setup to configure the Data visualization component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Data visualization component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. Configure the Data visualization component instance properties.

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- The Preview tab displays real-time data according to choices set in the component properties.
- For a description of the component properties related to the Data visualization component instance, see Component properties for the Data visualization.

5. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
6. Select the **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
7. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
8. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code must only be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();
```

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```
/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

9. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the website.

   Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handler in the Data visualization component.

10. In the Component code tab, review the generated code and select the **Copy component code**. The generated component code also includes configurations for event handlers and a donut chart.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Data visualization 1
-->
<sn-embedx-visualization-donut
 sort-by="value"
 data-labels-type="value"
 data-sources='[{"allowRealTime":true,"dataCategories":["trend"
,"group","simple"],"filterQuery":"active=true^sys_updated_onONL
ast 7
 days@javascript:gs.beginningOfLast7Days()@javascript:gs.endOfL
ast7Days()","id":"dGFibGVzbl9jdXN0b21lcnNlcnZpY2VfY2FzZTE3MjU0M
jYxODczODc=","isDatabaseView":false,"label":"Case","preferredVi
sualizations":["d24d53f6035 0de7a652caf3188a46ed2"],"reportSourc
eSysId":null,"sourceType":"table","tableOrViewName":"sn_custome
rservice_case"}]'
 metrics='[{"aggregateFunction":"COUNT","axisId":"primary","dat
aSource":"dGFibGVzbl9jdXN0b21lcnNlcnZpY2VfY2FzZTE3MjU0MjYxODczO
Dc=","id":"ZEdGaWJHVnpibDlqZFhOMGIyMWxjbk5sY25acFkyVmZZMkZ6WlRF
MO1qVTBNall4T0Rjek9EYzOxNzI1NDI2MTg4NjYx","numberFormat":{"cust
omFormat":false}}]'
 group-by='[{"disableRanges":false,"groupBy":[{"dataSource":"dG
FibGVzbl9jdXN0b21lcnNlcnZpY2VfY2FzZTE3MjU0MjYxODczODc=","groupB
yField":"state","isChoice":true,"isPaBucket":false,"isRange":fa
lse}],"hideZeroValues":true,"maxNumberOfGroups":"ALL","numberOf
GroupsBasedOn":"NO_OF_GROUP_BASED_ON_PER_METRIC","showOthers":f
alse}]'
 additional-group-by-
config='[{"id":"state","label":"State"},{"id":"account","label"
:"Account"}]'
 truncation-type="end"
 show-register
 register-position="bottom"
 register-orientation="horizontal"
 legend-horizontal-alignment="center"
 ranges-config='null'
 color-config='null'
 show-header
 header-color='null'
 title-color='null'
```

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```
 sort-by-order="desc"
 empty-state-illustration="no-data"
 empty-state-heading="No data available."
 empty-state-heading-level="3"
 empty-state-content="There are no scores available for the
 selected criteria. Contact your admin for more info."
 empty-state-alignment="vertical-centered"
 number-of-periods="3"
 period="M"
 user-info='"@context.session.user"'
 shared-context='null'
 colors='{}'>
</sn-embedx-visualization-donut>
<!--
 The component also includes the following additional
 properties:
 show-border
 drilldown-label
 show-data-labels
 max-label-size
 show-register-on-same-line
 show-register-value
 legend-max-item-width
 legend-expand-to-fit
 show-register-percentage
 wrap-title
 show-header-separator
 header-title
 description
 refresh-request
 show-additional-group-by-selector
 show-metric-label
 show-total-value
 enable-click-and-stay
 show-data-table
 enable-custom-empty-state
 apply-date-range
 show-absolute-period
 score-type
 start-time
 end-time
 use-current-date-for-end
 show-extended-error-messages
 auto-aggregate-periods
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxVisualizationDonut =
 document.querySelector('sn-embedx-visualization-donut');

 getEmbeddables(["sn-embedx-visualization-donut"]);

 const eventHandlers = {
```

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```
  'NOW_VIS_WRAPPER#PROPERTY_OVERRIDE' : (e) => {
    // Dispatched when the visualization overrides its property.
 For example when the user selects a different group by from
 the alternative group by selection
    var {properties} = e.detail.payload;
    console.log(properties);
  },
  'NOW_VIS_WRAPPER#SELECTED' : (e) => {
    // Dispatched when the user selects/de-selects element on
 data visualizations, typically to filter other content on the
 page
    var {title, type, isSelected, params, data} =
 e.detail.payload;
    console.log(title, type, isSelected, params, data);
  },
  'NOW_VIS_WRAPPER#CLICKED' : (e) => {
    // Dispatched when the visualization is clicked
    var {title, type, params, data} = e.detail.payload;
    console.log(title, type, params, data);
  }
 };

 setEvents(snEmbedxVisualizationDonut, eventHandlers);
</script>
```

Result

The global and component codes are ready to be shared with the third-party administrator to embed the Data visualization component instance on their third-party website.

What to do next

Embed the Data visualization component instance on the third-party website

Related topics

- Component properties for the Data visualization
- Event handler in the Data visualization component
- Sample code for the Data visualization component

Embed the Data visualization component instance on the third-party website

Embed the global code and component code of the Data visualization component instance that you configured so that you can enable your customers to start using the Data visualization component instance on your third-party website.

Before you begin

You must configure the Data visualization component instance. For information, see Configure the Data visualization component instance.

Role required: admin

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only must be added once to your third-party website.

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2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded component to verify that it launches the Data visualization component instance.

Result

The Data Visualization component instance appears on your third-party website.

Sample code for the Data visualization component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'NOW_VIS_WRAPPER#PROPERTY_OVERRIDE' : (e) => {

// Dispatched when the visualization overrides its property. For
 example when the user selects a different group by from the
 alternative group by selection

var {properties} = e.detail.payload;

console.log(properties);

},

'NOW_VIS_WRAPPER#SELECTED' : (e) => {

// Dispatched when the user selects/de-selects element on data
 visualizations, typically to filter other content on the page

var {title, type, isSelected, params, data} = e.detail.payload;

console.log(title, type, isSelected, params, data);

},

'NOW_VIS_WRAPPER#CLICKED' : (e) => {

// Dispatched when the visualization is clicked

var {title, type, params, data} = e.detail.payload;

console.log(title, type, params, data);

}
```

Related topics

Configure the Data visualization component instance

Embed the Data visualization component instance on the third-party website

Component properties for the Data visualization

Event handler in the Data visualization component

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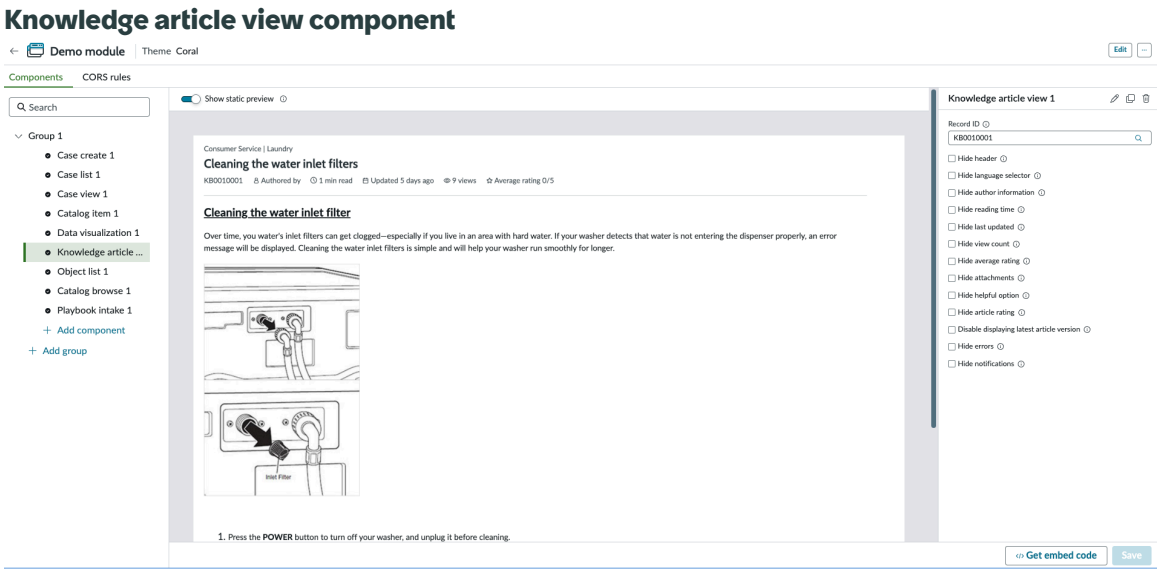
Knowledge article view component

Displays knowledge articles along with the key details like title, content, author, view count, read time, and others. You can also rate the article and switch the language according to your preferred locale.

Note: Knowledge article view component supports a mobile adaptive layout.



Configure the Knowledge article view component instance

Configure the Knowledge article view component instance so that your users can embed it on their website to access knowledge articles from their website directly.

Before you begin

You must have the following setup to configure the Knowledge article view component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Knowledge article view component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

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Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Knowledge article view component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Knowledge Article component instance, see Component properties for the Knowledge article view.
6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select the **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code only must be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
```

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```
}

/* Uncomment below function to handle guest session */
// await startGuestSession();

/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handler in the Knowledge article view component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Knowledge article view 1
-->
<sn-embedx-kb-article-view
 record-id="9d25b5b8dbd92200d75270f5bf96198b"></sn-embedx-kb-
article-view>
<!--
 The component also includes the following additional
 properties:
 hide-header
 hide-language-selector
 hide-author-information
 hide-reading-time
 hide-last-updated
 hide-view-count
 hide-average-rating
 hide-attachments
 hide-helpful-option
 hide-article-rating
 disable-displaying-latest-article-version
 hide-errors
 hide-notifications
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxKbArticleView =
 document.querySelector('sn-embedx-kb-article-view');

 getEmbeddables(["sn-embedx-kb-article-view"]);

 const eventHandlers = {
```

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```
  'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#BACK_BUTTON_CLICKED' : (e)
 => {
   // Event for back button clicked on mobile variant of
 knowledge article view.
   //Redirect to the knowledge browse page
   open('/knowledgebrowse', '_self');
  },
  'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#RATING_CLICKED' : (e) => {
   // This event is dispatched when rating is provided for the
 article
   var {rating} = e.detail.payload;
   console.log(rating);
  },

 'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#LANGUAGE_DROPDOWN_CLICKED' :
 (e) => {
   // This event is dispatched when language dropdown selection
 is clicked
   var {articleID} = e.detail.payload;

   // Set properties for the knowledge article view
   setProperties(snEmbedxKbArticleView, {recordId: articleID});

  },

 'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#NOTIFICATION_LINK_CLICKED' :
 (e) => {
   // This event is dispatched when link present on
 notification has been clicked
   var {table, sys_id} = e.detail.payload;

   if(table == 'kb_knowledge') {
    // Set properties for the knowledge article view
    setProperties(snEmbedxKbArticleView, {recordId: sys_id});
   }
  },
  'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#COMPONENT_READY' : (e) => {
   // This event is dispatched when a component is ready and
 usable.
  },
  'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#COMPONENT_ERROR' : (e) => {
   // This event is dispatched when a property validation or
 internal error occurs.
   var {errorMessage, errorType} = e.detail.payload;
   console.log(errorMessage, errorType);
  },
  'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#LINK_CLICKED' : (e) => {
   // This event is dispatched when a record link has been
 clicked inside article body
   var {table, sys_id} = e.detail.payload;
   console.log(table, sys_id);
  }
 };

 setEvents(snEmbedxKbArticleView, eventHandlers);
</script>
```

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Result
The global and component codes are ready to be shared with the third-party administrator to embed the Knowledge article view component instance on their third-party website.

What to do next
Embed the Knowledge article view component instance on the third-party website

Related topics

Component properties for the Knowledge article view

Event handler in the Knowledge article view component

Sample code for the Knowledge article view component

Embed the Knowledge article view component instance on the third-party website

Embed the global code and component code of the Knowledge article view component instance that you configured so that you can enable your customers to start using the Knowledge article view component instance on your third-party website.

Before you begin
You must configure the Knowledge article view component instance. For information, see Configure the Knowledge article view component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only must be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded web component to verify that it launches the Knowledge article view component instance.

Result
The Knowledge article view component instance appears on your third-party website.

Sample code for the Knowledge article view component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

},

'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#LINK_CLICKED' : (e) => {

// This event is dispatched when a record link has been clicked
 inside article body
```

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```
var {table, sys_id} = e.detail.payload;

console.log(table, sys_id);

},

'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#LANGUAGE_DROPDOWN_CLICKED' :
 (e) => {

// This event is dispatched when language dropdown selection is
 clicked

var {articleID} = e.detail.payload;



// Set properties for the knowledge article view

setProperties(snEmbedxKbArticleView, {recordId: articleID});

},

'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#NOTIFICATION_LINK_CLICKED' :
 (e) => {

// This event is dispatched when link present on notification
 has been clicked

var {table, sys_id} = e.detail.payload;



if(table == 'kb_knowledge') {

// Set properties for the knowledge article view

setProperties(snEmbedxKbArticleView, {recordId: sys_id});

}

},

'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#RATING_CLICKED' : (e) => {

// This event is dispatched when rating is provided for the
 article

var {rating} = e.detail.payload;

console.log(rating);

},

'SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW#COMPONENT_ERROR' : (e) => {
```

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```
// This event is dispatched when a property validation or
 internal error occurs.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

}
```

Related topics

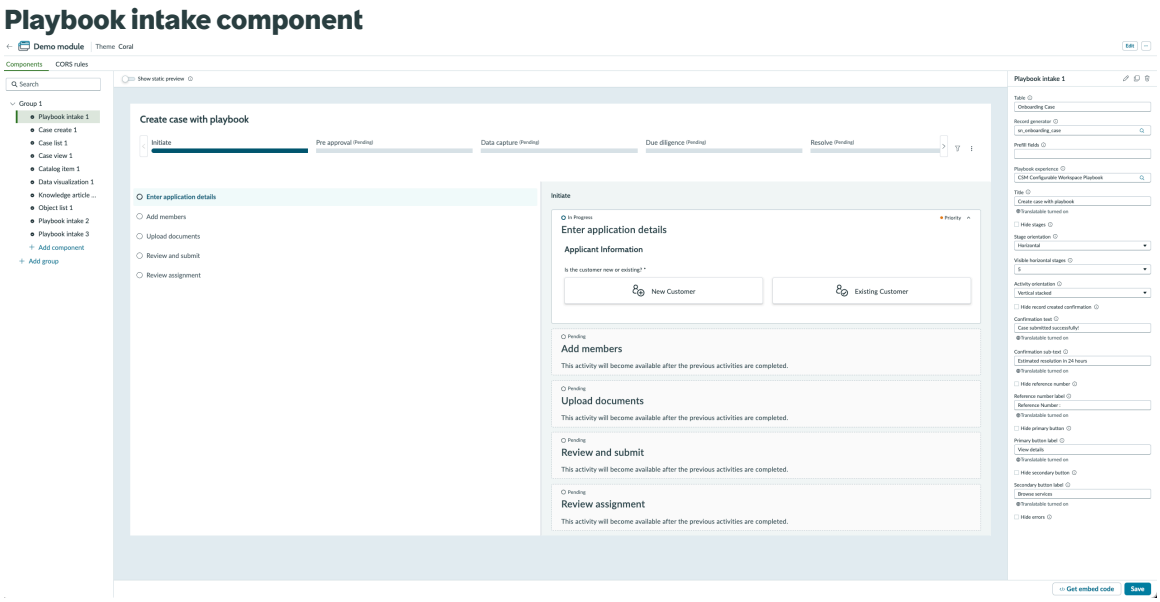
- Configure the Knowledge article view component instance
- Embed the Knowledge article view component instance on the third-party website
- Component properties for the Knowledge article view
- Event handler in the Knowledge article view component

Playbook intake component

Enable you to submit a case using the playbook guided experience, which systematically captures case details and displays the stages and activities involved in resolving the case.

You can use prefill fields or choose from various playbook experiences, and customize the display of stages, such as the number of visible stages and their horizontal or vertical orientation.

Note: Playbook Intake component supports a mobile adaptive layout.



Configure the Playbook intake component instance

Configure the Playbook intake component instance so that your users can embed it on their website and submit cases using playbook guided experience from their website directly.

Before you begin

You must have the following setup to configure the Playbook intake component instance:

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- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Playbook intake component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Playbook intake component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Playbook intake component instance, see Component properties for the Playbook intake.
6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select the **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select the **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code only must be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
```

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```
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180Offc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();

/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the website.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handler in the Playbook intake component.

11. In the Component code tab, review the generated code and select the **Copy component code**. The generated component code also includes configurations for event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Playbook intake 1
-->
<sn-embedx-playbook-intake
 table="sn_onboarding_case"
 sys-id="-1"
 playbook-title="Create case with playbook"
 stage-orientation="horizontal"
 max-visible-stages="5"
 activity-view-mode="focused"
 playbook-experience="0d71033773f220109edbc1f52ff6a741"
 record-generator="494435eb53a231103466ddeeff7b12e0"
```

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```
 confirmation-text="Case submitted successfully!"
 confirmation-sub-text="Estimated resolution in 24 hours"
 reference-number-label="Reference Number :"
 primary-button-label="View details"
 secondary-button-label="Browse services">
</sn-embedx-playbook-intake>
<!--
 The component also includes the following additional
 properties:
 hide-stages
 hide-errors
 hide-reference-number
 hide-primary-button
 hide-secondary-button
 hide-record-created-confirmation
 prefill-fields
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxPlaybookIntake =
 document.querySelector('sn-embedx-playbook-intake');

 /* Uncomment this code for the default behaviour of the
 Playbook intake component.

 // Get the table, playbook title, record generator and
 pre-fill fields from the current URL
 const currentURL = new URL(window.location.href);
 const urlParams = new URLSearchParams(currentURL.search);
 const tableName = urlParams.get('emb_table');
 const playbookTitle = urlParams.get('emb_playbook_title');
 const recordGenerator = urlParams.get('emb_record_generator');
 const prefillFields = urlParams.get('emb_prefill_fields');

 // Update the properties of the componentProperties object
 setProperties(snEmbedxPlaybookIntake,{table:
 tableName,recordGenerator:recordGenerator,playbookTitle:playbo
okTitle,prefillFields:prefillFields});
 */

 getEmbeddables(["sn-embedx-playbook-intake"]);

 const eventHandlers = {
  'SN_EMBEDX_PLAYBOOK_INTAKE#COMPONENT_READY' : (e) => {
   // This event is dispatched when a component is ready and
 usable.
  },
  'SN_EMBEDX_PLAYBOOK_INTAKE#COMPONENT_ERROR' : (e) => {
   // This event is dispatched when a property validation or
 internal error occurs.
   var {errorType, errorMessage} = e.detail.payload;
   console.log(errorType, errorMessage);
  },
```

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```
  'SN_EMBEDX_PLAYBOOK_INTAKE#RECORD_CREATION_SUCCEEDED' : (e)
 => {
   // Dispatched when a record is created by a Record Generator
 Playbook.
   var {table, sysId, number, playbook_experience_id,
 hide_record_creation} = e.detail.payload;
   if(hide_record_creation){
    var primaryURL =  '/caseview'; // Replace with the URL of
 the case view page

    // Construct the URL for the Case View component with URL
 parameters
    const caseViewURL = primaryURL + '?emb_table=' + table
 + '&emb_recordid=' + sysId + (playbook_experience_id
 === '98e09a560f2200102920c912d4767e1a' ? '' :
 '&emb_playbook_experience=' + playbook_experience_id);
    open(caseViewURL,'_self'); // Open case record when record
 created confirmation is hidden
   }
  },
  'SN_EMBEDX_PLAYBOOK_INTAKE#PRIMARY_BUTTON_CLICKED' : (e) => {
   // This event is dispatched when primary button is clicked
 on the record created confirmation page.
   var {table, record_sys_id, playbook_experience_id} =
 e.detail.payload;
   var primaryURL =  '/caseview'; // Replace with the URL of
 the case view page

   // Construct the URL for the Case View component with URL
 parameters
   const caseViewURL = primaryURL + '?emb_table=' + table +
 '&emb_recordid=' + record_sys_id + (playbook_experience_id
 === '98e09a560f2200102920c912d4767e1a' ? '' :
 '&emb_playbook_experience=' + playbook_experience_id);
   open(caseViewURL,'_self'); // Open case record when primary
 button is clicked

  },
  'SN_EMBEDX_PLAYBOOK_INTAKE#SECONDARY_BUTTON_CLICKED' : (e) =>
 {
   // This event is dispatched when secondary button is clicked
 on the record created confirmation page.
   var {table, record_sys_id} = e.detail.payload;
   var secondaryURL =  '/browse'; // Replace with the URL of
 the secondary page

   // Open the Case View component in the same tab
   open(secondaryURL,'_self');

  }
 };

 setEvents(snEmbedxPlaybookIntake, eventHandlers);
</script>
```

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Result
The global and component codes are ready to be shared with the third-party administrator to embed the Playbook intake component instance on their third-party website.

What to do next
Embed the Playbook intake component instance on the third-party website

Related topics

Component properties for the Playbook intake

Event handler in the Playbook intake component

Sample code for the Playbook intake component

Embed the Playbook intake component instance on the third-party website

Embed the global code and component code of the Playbook intake component instance that you configured so that you can enable your customers to start creating a case using the playbook guided experience on your third-party website.

Before you begin
You must configure the Playbook intake component instance. For information, see Configure the Playbook intake component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only needs to be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded web component to verify that it launches the Playbook intake component instance.

Result
The Playbook intake component instance appears on your third-party website.

Sample code for the Playbook intake component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'SN_EMBEDX_PLAYBOOK_INTAKE#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

},

'SN_EMBEDX_PLAYBOOK_INTAKE#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a property validation or
 internal error occurs.
```

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```
var {errorType, errorMessage} = e.detail.payload;

console.log(errorType, errorMessage);

},

'SN_EMBEDX_PLAYBOOK_INTAKE#RECORD_CREATION_SUCCEEDED' : (e) => {

// Dispatched when a record is created by a Record Generator
 Playbook.

var {table, sysId, number, playbook_experience_id,
 hide_record_creation} = e.detail.payload;

if(hide_record_creation){

var primaryURL = '/caseview'; // Replace with the URL of the
 case view page



// Construct the URL for the Case View component with URL
 parameters

const caseViewURL = primaryURL + '?emb_table=' + table
 + '&emb_recordid=' + sysId + (playbook_experience_id
 === '98e09a560f2200102920c912d4767e1a' ? '' :
 '&emb_playbook_experience=' + playbook_experience_id);

open(caseViewURL,'_self'); // Open case record when record
 created confirmation is hidden

}

},

'SN_EMBEDX_PLAYBOOK_INTAKE#PRIMARY_BUTTON_CLICKED' : (e) => {

// This event is dispatched when primary button is clicked on
 the record created confirmation page.

var {table, record_sys_id, playbook_experience_id} =
 e.detail.payload;

var primaryURL = '/caseview'; // Replace with the URL of the
 case view page



// Construct the URL for the Case View component with URL
 parameters

const caseViewURL = primaryURL + '?emb_table=' + table +
 '&emb_recordid=' + record_sys_id + (playbook_experience_id
 === '98e09a560f2200102920c912d4767e1a' ? '' :
 '&emb_playbook_experience=' + playbook_experience_id);
```

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```
open(caseViewURL,'_self'); // Open case record when primary
 button is clicked

},

'SN_EMBEDX_PLAYBOOK_INTAKE#SECONDARY_BUTTON_CLICKED' : (e) => {

// This event is dispatched when secondary button is clicked on
 the record created confirmation page.

var {table, record_sys_id} = e.detail.payload;

var secondaryURL = '/browse'; // Replace with the URL of the
 secondary page



// Open the Case View component in the same tab

open(secondaryURL,'_self');

}
```

Related topics

- Configure the Playbook intake component instance
- Embed the Playbook intake component instance on the third-party website
- Component properties for the Playbook intake
- Event handler in the Playbook intake component

Catalog browse component

Catalog browse component enables you to browse and search catalog items from different catalogs and categories within a third-party website.

You can search for specific items using keywords, and access dynamic content like playbooks. It also offers quick links to recently requested and popular items for quick navigation. As an administrator, you can configure the behavior and appearance such as hiding prices or navigation panels to customize the experience to specific needs.

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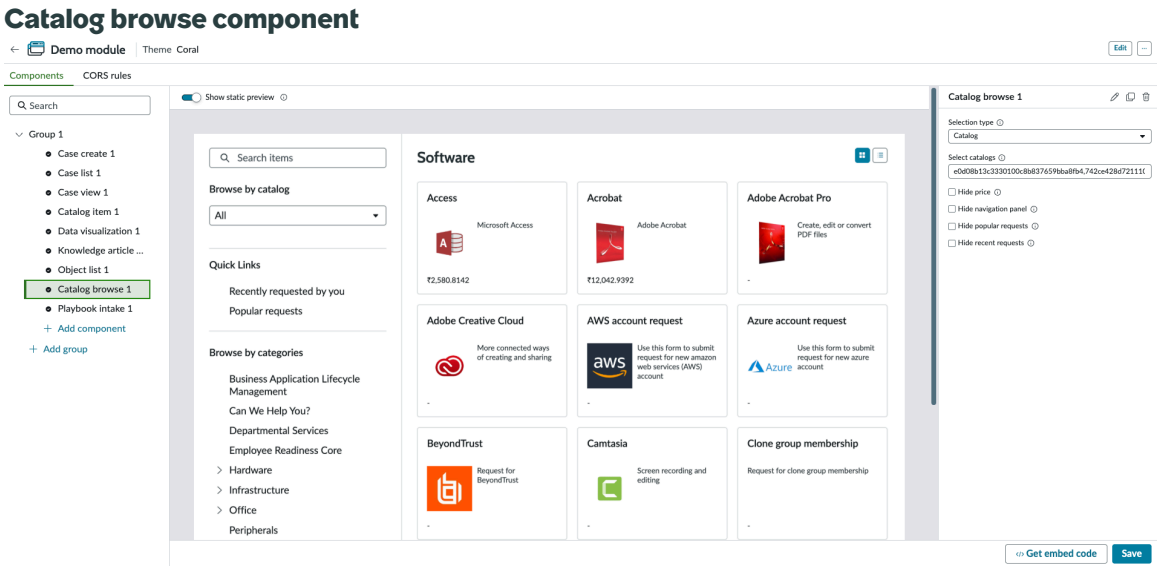

Configure the Catalog browse component instance

Configure the Catalog browse component instance so that your user can embed it on their website to browse and search catalog items from different catalogs and categories.

Before you begin

You must have the following setup to configure the Catalog browse component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Catalog browse component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Catalog browse component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Catalog browse component, see Component properties for the Catalog browse.

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6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code only must be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '59180ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();

/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

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10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handlers in the Catalog browse component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Catalog browse 1
-->
<sn-embedx-catalog-browse
 selection-type="catalog"></sn-embedx-catalog-browse>
<!--
 The component also includes the following additional
 properties:
 select-catalogs
 select-categories
 hide-price
 hide-navigation-panel
 hide-popular-requests
 hide-recent-requests
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxCatalogBrowse =
 document.querySelector('sn-embedx-catalog-browse');

 getEmbeddables(["sn-embedx-catalog-browse"]);

 const eventHandlers = {
  'CATALOG_BROWSE#COMPONENT_READY' : (e) => {
   // This event is dispatched when a component is ready and
 usable.
  },
  'CATALOG_BROWSE#CATALOG_ITEM_SELECTED' : (e) => {
   // This event is dispatched when a catalog item is selected.
   var {catalog_item_details} = e.detail.payload;
   // Logic to construct the URL based on the catalog item
 details
   let redirectURL;
   const type = catalog_item_details.type;

   if (type === 'catalog_item' || type === 'record_producer') {
    redirectURL = '/catalog_form?emb_recordid=' +
 catalog_item_details.sys_id;
   } else if (type === 'content_item') {
    const content_type = catalog_item_details.content_type;
```

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```
    if (content_type === 'kb') {
     redirectURL = '/article_view?emb_recordid=' +
catalog_item_details.kb_article;
    } else if (content_type === 'external') {
     redirectURL = catalog_item_details.url;
    } else if (content_type === 'dynamic') {
     const dynamicContentItemDetails =
catalog_item_details.dynamicContentItemDetails;
     // Check for 'Playbook' dynamic content type
     if(dynamicContentItemDetails.dynamicContentType ===
'c0e6a7144392311 0f6669c7385b8f20a')
      redirectURL = '/playbook_intake?emb_playbook_title='
+ dynamicContentItemDetails.content.title +
'&emb_table=' + dynamicContentItemDetails.content.table +
'&emb_record_generator=' +
dynamicContentItemDetails.content.query +
'&emb_playbook_experience=' +
dynamicContentItemDetails.content.playbook_experience;
    }
   }
   // Redirect to the respective component page
   open(redirectURL, '_self');
  },
  'CATALOG_BROWSE#COMPONENT_EMPTY' : (e) => {
   // This event is dispatched when a component has nothing to
display.
  },
  'CATALOG_BROWSE#COMPONENT_ERROR' : (e) => {
   // This event is dispatched when a component encounters an
error.
   var {errorMessage, errorType} = e.detail.payload;
   console.log(errorMessage, errorType);
  }
 };

 setEvents(snEmbedxCatalogBrowse, eventHandlers);
</script>
```

Result

The global and component codes are ready to be shared with the third-party administrator to embed the Catalog browse component instance on their third-party website.

What to do next

Embed the Catalog browse component on the third-party website

Related topics

- Component properties for the Catalog browse
- Event handlers in the Catalog browse component
- Sample code for the Catalog browse component

Embed the Catalog browse component on the third-party website

Embed the global code and component code of the Catalog browse component that you configured in your instance so that you can enable your customers to start using the component on your third-party website.

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Before you begin

You must configure the Catalog browse component instance. For information, see Configure the Catalog browse component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only needs to be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded web component to verify that it launches the Catalog browse component instance.

Result

The Catalog browse component instance appears on your third-party website.

Sample code for the Catalog browse component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'CATALOG_BROWSE#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

},

'CATALOG_BROWSE#CATALOG_ITEM_SELECTED' : (e) => {

// This event is dispatched when a catalog item is selected.

var {catalog_item_details} = e.detail.payload;

// Logic to construct the URL based on the catalog item details

let redirectURL;

const type = catalog_item_details.type;



if (type === 'catalog_item' || type === 'record_producer') {

redirectURL = '/catalog_form?emb_recordid=' +
 catalog_item_details.sys_id;

} else if (type === 'content_item') {

const content_type = catalog_item_details.content_type;
```

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```
if (content_type === 'kb') {

redirectURL = '/article_view?emb_recordid=' +
 catalog_item_details.kb_article;

} else if (content_type === 'external') {

redirectURL = catalog_item_details.url;

} else if (content_type === 'dynamic') {

const dynamicContentItemDetails =
 catalog_item_details.dynamicContentItemDetails;

// Check for 'Playbook' dynamic content type

if(dynamicContentItemDetails.dynamicContentType ===
 'c0e6a7144392311 0f6669c7385b8f20a')

redirectURL = '/playbook_intake?emb_playbook_title=' +
 dynamicContentItemDetails.content.title + '&emb_table='
 + dynamicContentItemDetails.content.table +
 '&emb_record_generator=' +
 dynamicContentItemDetails.content.query +
 '&emb_playbook_experience=' +
 dynamicContentItemDetails.content.playbook_experience;

}

}

// Redirect to the respective component page

open(redirectURL, '_self');

},

'CATALOG_BROWSE#COMPONENT_EMPTY' : (e) => {

// This event is dispatched when a component has nothing to
 display.

},

'CATALOG_BROWSE#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a component encounters an
 error.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

}
```

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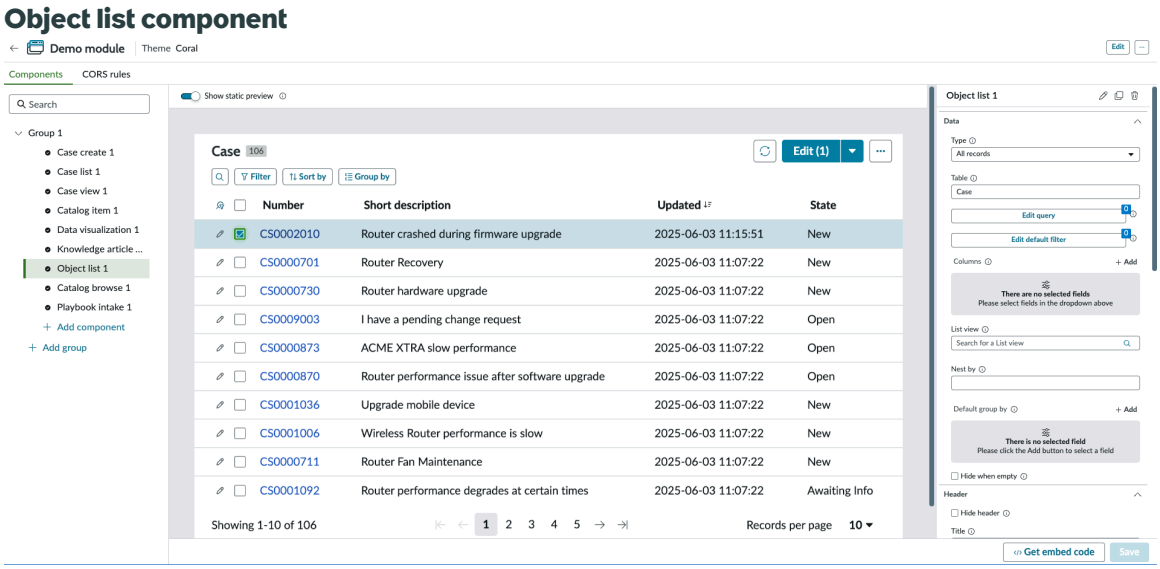
Related topics

- Configure the Catalog browse component instance
- Embed the Catalog browse component on the third-party website
- Component properties for the Catalog browse
- Event handlers in the Catalog browse component

Object list component

Enables you to display records from different tables with their related actions in a list format. It supports bulk and inline actions like editing fields, assigning items, or changing states directly from the list. It also shows various record types such as interactions or orders.

Users can sort, filter, and take actions directly on the list. It also supports nested rows to show hierarchical relationships.



Configure the Object list component instance

Configure the Object list component instance so that your user can embed it on their website to display information from any ServiceNow table. The component allows you to configure column selection, filtering, sorting, and pagination options.

Before you begin

You must have the following setup to configure the Object list component instance:

- Enable Web Embeddables in your instance. For more information, see Activate Web Embeddables.
- Set up a custom URL as the instance URL.
- Authenticate the ServiceNow components using OpenID Connect (OIDC) or non OIDC authentication. For more information, see Authenticate the ServiceNow components using OIDC and Non OIDC authentication for ServiceNow components.

Role required: sn_embeddable_core.emb_admin

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Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the homepage, select Create module or use the existing module.
   For more information on creating a new module, see Create a module.
3. On the module page, in the Components tab, add a Object list component instance to an existing or a new group.
   For more information on creating a group and then adding a component instance, see Create a group and add a component instance.
4. **Optional:** Toggle the **Show static preview** option to see a visual representation of a component when a live preview isn't available.

   Note: When enabled, any changes to the global or component properties don't appear in the Preview tab in real-time.

5. Configure the Object list component instance properties.
   - The Preview tab displays real-time data according to choices set in the component properties.
   - For a description of the component properties related to the Object list component instance, see Component properties for the Object list.
6. Select the **CORS rules** tab to configure the CORS rules.
   For more information about configuring CORS rules, see Configure CORS (Cross-Origin Resource Sharing) rules before embedding ServiceNow components.
7. Select **Components** tab.
   If a message appears about the application scope, change the scope to **Web Components for Customer Service** to be able to edit the record.
8. Select **Get embed code**.
   A pop-up window appears to display both Global code and Component code.
9. In the Global code tab, review the generated code and select the **Copy global code**.
   The global code only must be added once to your third-party webpage.

```
import { init, login, logout, startGuestSession } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

await init({
    theme: 'fad87d2ca304121029a4d1aed31e610f',  /* sys_id of
 the theme to use for the embeddable components in your website
 */
    baseURL: 'https://demo.servicenow.com', /* Base URL of the
 instance to be used for the embeddable components in your
 website */
    authCallback: getTokenCallBack, /* Function which returns
 the auth token for the current user, required for auth setup
 */
    module: '591800ffc1243610f87714367ed47c6a', /* Demo module
 */
    pageName: document.title, /* Uses the browser's document
 title as the page name in User analytics experience */
    guestTokenCallback: getGuestJWTTokenCallBack, /* Function
 which returns the guest token for the current user, required
 for guest validation setup */
```

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```
    cacheComponents: [] /* Pre-caches resources for improved
 performance. Update component list as per your usage */
});

function getTokenCallBack() {
    var idToken; /* Get the id token for the current user */
    return Promise.resolve(idToken);
}

function getGuestJWTTokenCallBack() {
    var guestToken; /* Get the guest token for the current user
 */
    return Promise.resolve(guestToken);
}

/* Uncomment below function to handle guest session */
// await startGuestSession();

/* Uncomment below functions to handle login and logout once
 the user logs into your website */
// await login();
// await logout();
```

10. **Optional:** In the Component Code tab, slide the **Enable event handler** toggle switch to handle events triggered by the user interactions on the webpage.

    Note: Enabling the event handler also modifies the component code. For more information on event handlers in Web Embeddables, see Event handlers in the Object list component.

11. In the Component code tab, review the generated code and select the **Copy component code**. This generated code also includes event handlers.

```
<!--
    Module: Demo module
    Group: Group 1
    Instance: Object list 1
-->
<sn-embedx-object-list
 type="default"
 table="sn_customerservice_case"
 action-config="6316ec1355dd422a8ebfdeb6336b1179"
 child-records-per-load="10"
 max-cell-characters="500"
 records-per-page='[10,20,50]'
 visible-page-range="5"
 footer-text="View All"
 max-top-records="20"
 header-size="md">
</sn-embedx-object-list>
<!--
 The component also includes the following additional
 properties:
 hide-header
 hide-record-count
 hide-search
 hide-filters
```

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```
 disable-column-selection
 hide-actions
 max-columns-displayed
 hide-record-links
 show-reference-record-links
 disable-column-highlighting
 shade-alternate-rows
 hide-child-record-count
 disable-quick-edit
 disable-cell-wrapping
 disable-cell-editing
 hide-errors
 limit-records-fetched
 hide-page-size-control
 disable-cell-filtering
 disable-column-sorting
 disable-column-filtering
 disable-column-grouping
 show-condition-builder
 hide-refresh-button
 disable-title-wrap
 disable-column-resizing
 disable-column-drag-and-drop
 disable-row-drag-and-drop
 expand-groups-by-default
 hide-toggle-all-groups-button
 hide-when-empty
 edit-query
 default-filter
 columns
 list-view
 nest-by
 default-group-by
 list-title
 subtitle
 highlighted-value-config
-->

<script type="module">
 import { getEmbeddables, setEvents, setProperties } from
 'https://demo.servicenow.com/uxasset/externals/sn_embeddable_c
ore/index.jsdbx';

 const snEmbedxObjectList =
 document.querySelector('sn-embedx-object-list');

 /* Uncomment this code to set Object list properties using URL
 parameters.

 // Get the table, query, view or nestby from the URL
 parameters to dynamically set the component properties. For
 related list, get sysRecordID to use it in filter.
 const currentURL = new URL(window.location.href);
 const urlParams = new URLSearchParams(currentURL.search);
 const tableName = urlParams.get('emb_table');
 const filter = urlParams.get('emb_filter');
 const view = urlParams.get('emb_view');
```

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```
 const nestby = urlParams.get('emb_nestby');
 const sysRecordId = urlParams.get('emb_recordid');

 // Update the table, filter, view or nestby properties of the
 component
 setProperties(snEmbedxObjectList, {
  table: tableName,
  editQuery: filter || '<fieldname>=' + sysRecordId,
  listView: view,
  nestBy: nestby
 });
*/

 getEmbeddables(["sn-embedx-object-list"]);

 const eventHandlers = {
  'SN_EMBEDX_OBJECT_LIST#FOOTER_LINK_SELECTED' : (e) => {
   // This event is dispatched when footer link is selected
   var {table, view, edit_query, nest_by} = e.detail.payload;
 // the logic to construct the URL for the Record View
 component. Add your portal URL here.
 const objectListURL = '/objectlist?emb_table=' + table
 + '&emb_query=' + edit_query + '&emb_view=' + view +
 '&emb_nestby=' + nest_by;
 // Open the Record List component in the same tab
 open(objectListURL, '_self');
  },
  'SN_EMBEDX_OBJECT_LIST#COMPONENT_ERROR' : (e) => {
   // This event is dispatched when a property validation or
 internal error occurs.
   var {errorMessage, errorType} = e.detail.payload;
   console.log(errorMessage, errorType);
  },
  'SN_EMBEDX_OBJECT_LIST#RECORD_SELECTED' : (e) => {
   // This event is dispatched when a record is selected.
   var {table, record_sys_id} = e.detail.payload;

   var RecordViewURL;
   if(table == 'sn_customerservice_case'){
    RecordViewURL = '/caseview?emb_table=' + table +
 '&emb_recordid=' + record_sys_id;
   } else {
    RecordViewURL = '/recordview?emb_table=' + table +
 '&emb_recordid=' + record_sys_id;
   }
   open(RecordViewURL, '_self');
  },
  'SN_EMBEDX_OBJECT_LIST#COMPONENT_READY' : (e) => {
   // This event is dispatched when a component is ready and
 usable.
  }
 };

 setEvents(snEmbedxObjectList, eventHandlers);
</script>
```

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Result
The global and component codes are ready to be shared with the third-party administrator to embed the Object list component instance on their third-party website.

What to do next
Embed the Object list component on the third-party website

Related topics

Component properties for the Object list

Event handlers in the Object list component

Sample code for the Object list component

Embed the Object list component on the third-party website

Embed the global code and component code of the Object list component that you configured in your instance so that you can enable your customers to start using the component on your third-party website.

Before you begin
You must configure the Object list component instance. For information, see Configure the Playbook intake component instance.

Role required: None

Procedure

1. On your third-party website, in the website's HTML file, paste the global code that you copied.

   Note: The global code only needs to be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. **Optional:** Open the website to which you embedded web component to verify that it launches the Object list component instance.

Result
The Object list component instance appears on your third-party website.

Sample code for the Object list component

Sample code is provided to define an action when an event is triggered. Update the sample code for your use case before embedding the component on your webpage.

Sample code

```
{

'SN_EMBEDX_OBJECT_LIST#FOOTER_LINK_SELECTED' : (e) => {

// This event is dispatched when footer link is selected

var {table, view, edit_query, nest_by} = e.detail.payload;

const objectListURL = '/objectlist?emb_table=' + table
 + '&emb_query=' + edit_query + '&emb_view=' + view +
 '&emb_nestby=' + nest_by;

// Open the Record List component in the same tab
```

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```
open(objectListURL, '_self');

},

'SN_EMBEDX_OBJECT_LIST#COMPONENT_ERROR' : (e) => {

// This event is dispatched when a property validation or
 internal error occurs.

var {errorMessage, errorType} = e.detail.payload;

console.log(errorMessage, errorType);

},

'SN_EMBEDX_OBJECT_LIST#RECORD_SELECTED' : (e) => {

// This event is dispatched when a record is selected.

var {table, record_sys_id} = e.detail.payload;



var RecordViewURL;

if(table == 'sn_customerservice_case'){

RecordViewURL = '/caseview?emb_table=' + table +
 '&emb_recordid=' + record_sys_id;

} else {

RecordViewURL = '/recordview?emb_table=' + table +
 '&emb_recordid=' + record_sys_id;

}

open(RecordViewURL, '_self');

},

'SN_EMBEDX_OBJECT_LIST#COMPONENT_READY' : (e) => {

// This event is dispatched when a component is ready and
 usable.

}
```

Embed ServiceNow components instance on the third-party website

Embed the global code and component code of the components that you configured in your instance so that you can enable your customers to start using component instance on your third-party website.

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Before you begin

At least one ServiceNow component should be configured in your instance. For more information, see Configure the ServiceNow component instance.

Role required: none

About this task

This procedure outlines the high-level steps that you must follow to embed Web Embeddables component instance on your third-party website.

Procedure

1. On your third-party website, in your website's HTML file, paste the global code that you copied.

   Note: The global code only needs to be added once to your third-party website.

2. On your website's HTML file, paste the component code that you copied.
3. Open the website in which you embedded the component instance to verify that it launches the component.

Result

The ServiceNow component instance you've embedded appears on your third-party website.

Update or create web components

Enables you to update or create ServiceNow web components on your instance.

UI Builder toolbox filter

The UI Builder toolbox includes an embed-ready category that displays only components that are available by default and verified to work within the Web Embeddables rendering context. These components are pre-validated to confirm consistent and reliable behavior when embedded on third-party websites. Custom components aren't displayed in this category.

You can select components outside the embed-ready category, but components from other categories are embed-ready. If you add a component from another category, verify that it meets the criteria for embedding components on third-party websites before adding them to your module.

Navigate back to the Web Embeddables application

When you're redirected from the Web Embeddables app to UI Builder, the component is automatically created and appears in the Manage Components section on the Web Embeddables home page, regardless of whether you make any changes in UI Builder.

If you configure the component using its properties in UI Builder, save your changes before returning to the Web Embeddables app. If you navigate away without saving, you lose any configuration changes you have made.

To return to the Web Embeddables app, select **Configure Embeddables** in the UI Builder toolbar. This option is available only for embeddable components. From the Manage Components section, you can manage and include the component in your module.

Reduced feature set in UI Builder

UI Builder offers a reduced feature set when working with embeddable components. The **Settings** tab isn't available, as the Web Embeddables app manages embeddable identity and

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configuration. This confirms that embeddable details remain consistent and are manged from a single location.

In UI Builder, you can edit component properties and preview the embeddable component to verify its appearance and behavior before publishing. To edit embeddable details such as name and description, go to the Web Embeddables app.

Manage embeddable components in UI Builder

To initiate a new embeddable creation workflow, start from the Web Embeddables app. This confirms the component is correctly registered as an embeddable and follows the supported creation workflow.

Embeddable components are visible in the UI Builder component list and are classified as Embeddable under the Associated Type column. To quickly locate all embeddable components, select the Embed-ready as the category in the component list. This displays only components that are verified to work within the Web Embeddables rendering context, making it easier to identify and manage your embeddable components from a single view.

ServiceNow components

ServiceNow components are reusable building blocks that enable you to simplify the process of adding functionality to any website. You can clone components and customize them using a low-code approach.

The following are the prebuilt components that you can configure and embed on your third-party website.

ServiceNow components

Widget	Description
Case list component	Displays a comprehensive list of multiple cases along with their key details.
Case create component	Displays a detailed view of all case-related activities.
Case view component	Displays a form that helps you to create a case to address any issues related to products and services. Case view component also includes a process tab that displays relevant playbooks for the case record.
Catalog item component	Displays a form that you can fill in to request an item or service.
Knowledge article view component	Display knowledge article with key details like title, content, author, view count, and real time.
Data visualization component	Display a graphical representation of information from any ServiceNow table using visual elements such as single score, pie chart, donut, and semi donut.
Playbook intake component	Enable users to submit cases using Playbook's guided experience. Systematically capture case details and display stages and activities involved in resolving the case.
Catalog browse component	Display catalog items from different catalog and categories.
Object list component	Display catalog items from different catalogs and categories.

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Custom component

You can create a component or customize the existing components in UI Builder such as adding more properties to make the component configurable. UI Builder enables you to incorporate additional underlying components, and update the component bindings. The prebuilt components are non-customizable and are labeled with Default, however, you can clone them and then customize the cloned version as needed. Once you create a custom component, it's marked with the label Custom, making it easy to identify.

Create a custom component

Create a custom component to present information, capture user input, or offer interactive functionality on a third party website. You can also clone the existing component and customize it.

Before you begin

- Beginning with the Zurich release, Component UI Builder is enabled by default in your instance.
- Existing customers on release versions before Zurich release, you must enable Component UI Builder in your instance by activating UI Builder plugin (sn_ui_builder) to create a custom component.
- Make sure you're referring UI Builder version 27.2 or above for component creation.
- Ensure the [sn_cb_experiences.uib.enable.cb] system property is set to true.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embedabbles** > **Homepage**.
2. In the Manage components section, select **Create component**.
3. Enter the following field values.

Field	Description
Name	Name of the custom component.
Component tag suffix	Enter a unique value to append to the prefix of component tag. It can't be edited later.
Component tag	The tag used in the embed code helps identify the component.
Description	Description of your component.
Icon	Thumbnail image of the custom component.

4. Select **Create component**.
   The UI Builder application opens in a new browser tab in embeddable mode, where you can customize the component.
5. In a blank canvas, select **Add content**.

   Note: Component palette displays components that are eligible to embed. Make sure the embed-ready category is selected.

6. Select the component.

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7. Configure the component properties.
8. **Optional:** Select component from the other category.

   Note: If you select any other category, make sure added component meets the criteria for embedding components on third-party websites.

9. Save the changes.
10. Select the **Configure embeddable** to navigate back to the Web Embeddables app homepage.

Result

The custom component is created and shown under the **Manage components** section on the Web Embeddables app home page and is identified by the **Custom** label.

Edit a custom component

Edit a custom component to further customize its design and properties as per the requirement. You can only edit a custom component that is in a deactivated state. Prebuilt components cannot be modified.

Before you begin

Beginning with the Zurich release, Component UI Builder is enabled by default in your instance. Existing customers on release versions before Zurich release, you must enable Component UI Builder in your instance to edit a component. Make sure you're referring UI Builder version 27.2 or above for editing component.

Make sure you're referring UI Builder version 27.2 or above for component creation.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the Manage components section, select Action (#) on the component.

   Note: You can only edit components that are labeled as **Custom**.

3. Select **Edit**.
4. Modify the following field values.

Field	Description
Name	Name of the custom component.
Component tag	The tag used in the embed code helps identify the component.
Description	Description of your component.
Icon	Thumbnail image of the custom component.

5. Select **Save and close**.
6. **Optional:** Select **Edit component**.

   Note: You will be redirected to the UI Builder application where you can modify the component.

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Clone a component

Clone a prebuilt component to create a custom version that can be tailored to specific needs, such as the modification of properties and underlying components.

Before you begin

Beginning with the Zurich release, Component UI Builder is enabled by default in your instance. Existing customers on release versions before Zurich release, you must enable Component UI Builder in your instance to clone a component. Make sure you're referring UI Builder version 27.2 or above for cloning component.

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the Manage components section, select Action (#) on the component.
3. Select **Clone**.
4. Modify the following field values.

Field	Description
Name	Name of the custom component.
Component tag suffix	Enter a unique value to append to the prefix of component tag. It cannot be edited later.
Component tag	The tag used in the embed code helps identify the component.
Description	Description of the component.
Icon	Thumbnail image of the custom component.

5. Select **Clone component**.
   The UI Builder application opens in a new browser tab in embeddable mode, where you can customize the component.
6. In a blank canvas, select **Add content**.

   Note: Component palette displays components that are eligible to embed. Make sure the embed-ready category is selected.

7. Select the component.
8. Configure the component properties.
9. **Optional:** Select component from the other category.

   Note: If you select any other category, make sure added component meets the criteria for embedding components on third-party websites.

10. Save the changes.
11. Select the **Configure embeddable** to navigate back to the Web Embeddables app homepage.

Result

The component is created and shown under the **Manage components** section on the Web Embeddables app home page and is identified by the **Custom** label.

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Activate or deactivate a component

Activate or deactivate a component to show or hide every instance of the components across third-party websites. By default, the ServiceNow components are active.

Before you begin

Role required: sn_embeddable_core.emb_admin

Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the Manage components section, select Action (#) on the component.
3. Select **Activate**.

   Note: A confirmation dialog box appears. Review the information before proceeding. If your component is active, the **Deactivate** option appears.

4. Select **Activate** on the confirmation modal.

   Note:

   - A confirmation message appears `Component is now active and its existing instances may become visible on your websites.` Ensure the [glide.uxf.lib.embeddables.enabled] system property is set to true on your instance.
   - If you deactivate a component, a confirmation message appears `Component is now inactive and its existing instances are hidden on your websites.`

Result

Any existing component and its instances are hidden on your website.

Delete a custom component

Delete a component to remove a custom component and all its instances from the Web Embeddables application and websites. You can only delete custom components that are in a deactivated state. Once deleted, the custom components can't be restored.

Before you begin

You must create a custom component. For more information, see Create a custom component.

Role required: sn_embeddable_core.emb_admin

About this task

Deleting a component is a permanent and irreversible action. When you delete a component, the following events occur:

- The component is removed from the Web Embeddables application.
- All component instances of the component embedded in your modules are deleted.
- Any embed code associated with these instances becomes non-functional on your webpages, and results in broken or missing content where the component was previously displayed.

This action cannot be undone. Before proceeding, review all dependencies and confirm that the component is no longer required in any module or webpage.

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Procedure

1. Navigate to **All** > **Web Embeddables** > **Homepage**.
2. In the Manage components section, select Action (#) on the component.
3. Select **Delete**.

   Note: A dialog box appears for confirmation. Review the information.

4. Select **Delete**.

   Note: A confirmation message appears `Component is now inactive and its existing instances may become hidden on your websites.`

Result

The custom component and its instances disappear from the **Manage components** section on the Web Embeddables application homepage and the website where it's embedded.

Navigating the Usage Insights for Web Embeddable application

Learn how to navigate the Usage Insights application to view telemetry data for Web Embeddables. Access user analytics dashboards that display metrics organized by module and page to understand component user interactions across your external websites.

Different users have different rights and privileges in the Usage Insights application. Users with any Usage Insights viewer role can access the Web Embeddables application by navigating to **All** > **Platform Analytics** > **Usage Insights**. Select the application name from the All Application list that matches the Web Embeddables module name. Analytics for each Web Embeddables module are tracked separately as individual applications. To track analytics for a module, include the Web Embeddables module ID with the page title in the global embed code.

All Applications view

When you launch Usage Insights it displays three tabs based on the selected All Applications option:

Overview

The Overview tab allows you to view aggregate usage within a given time frame across all your tracked components. There are number of filters you can configure to see scores for Active users, Sessions, and Average session duration, as well as a list showing usage by individual components.

Dashboard

Displays dashboards that users create within the Usage Insights application to monitor and analyze usage data. This view shows only dashboards built specifically in Usage Insights, not dashboards from other ServiceNow applications. Access this view only if you have the appropriate roles and permissions for the Usage Insights application.

Events

This tab enables you to filter and view tracked user interactions for your Web Embeddables components embedded on third-party websites.

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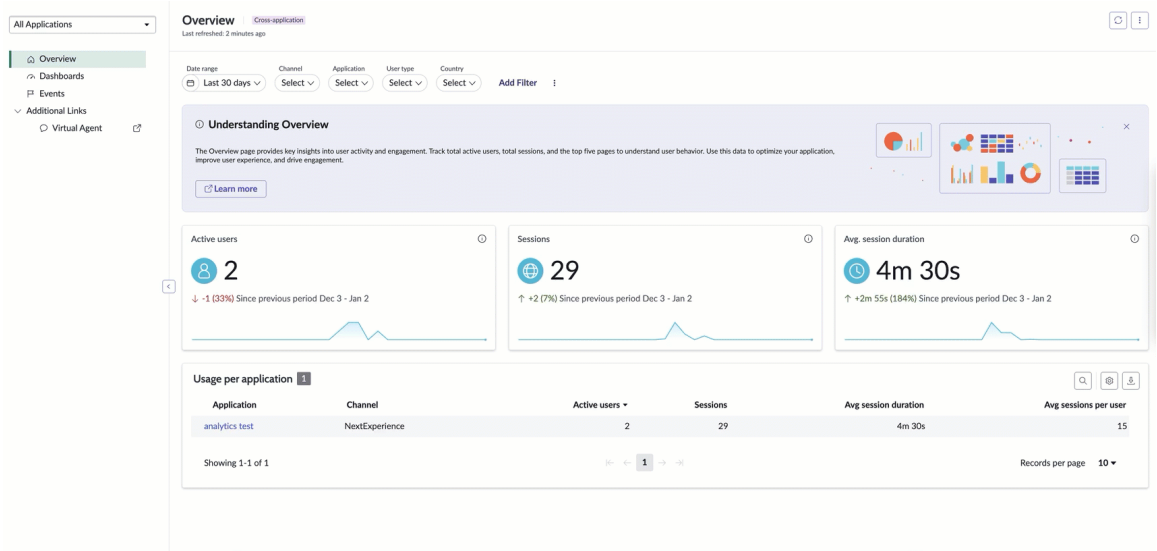
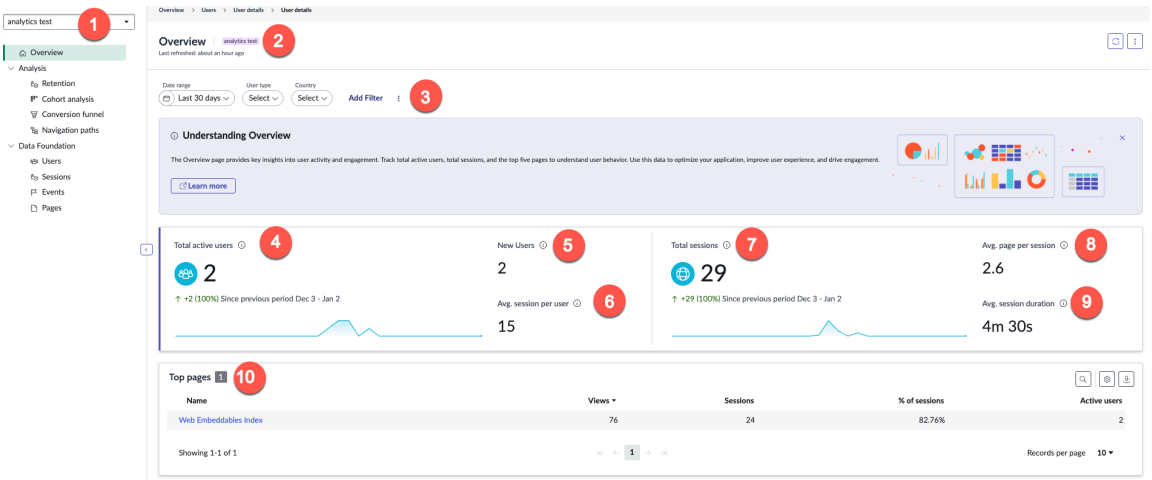
Web Embeddables dashboard overview



Metrics across the Web Embeddables module

The Overview tab provides key insights into user activity and engagement for your Web Embeddables components on third-party websites. Track metrics such as total active users, new users, total sessions, average pages per session, and average session duration to understand user behavior. Use this data to assess user engagement levels and identify top pages where your embedded components drive the most activity.

Select your module from the All Applications from the applications list to see these metrics simultaneously.



Application, platform, and version menus

Feature area	UI component	Description
1	Applications list	List of registered web and mobile applications. You can select Web Embeddables module from the list. • **All Applications** (default landing page) shows basic statistics across all applications within the current instance. • Select module to view usage insights of components.

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Application, platform, and version menus (continued)

Feature area	UI component	Description
2	Selected dashboard menu item	The Overview, Analysis, or Data Foundation item you've selected. In the example, **Overview** is selected.
3	Filters	Default filters you can use to limit the data, including Date Range, User type, and location. Use the **Add Filter** option to add more filters to the page. For more information, see Filter data in Usage Insights.
4	Total active users	Shows Active users, new users, and the average number of sessions per user. Select any visualization in this section to view the trend analysis for Active users.
5	New Users	Number of visitors who have visited the applications for the first time in the specified time period.
6	Avg. Session per user	Average number of sessions per user in the specified time period.
7	Total sessions	Shows the total number of sessions, the average page views per session, and the average session duration. Select any visualization in this section to view the sessions trend analysis.
8	Avg. page per session	Average number of pages visited per session.
9	Avg. Session duration	Average time spent across sessions for all users.
10	Top pages	List of pages with the most views and most sessions. Select any entry in the list to dive into the views and related information.

Note:

- Counters in the Usage Insights application contain aggregated user numbers.
- If a country's tracking consent policy is set to **Disabled**, user metrics are not tracked.

Metrics across all applications

You can view basic application usage and event details for all applications within an instance. Select your module from the applications list to see these metrics simultaneously. The Analysis menu items provide access to the Retention, Cohort analysis, Conversion funnel, and Navigation paths modules. The Data Foundation menu items provide access to the Users, Sessions, Events, and Pages modules.

Analysis

Module	Description
Retention	Visualize new users and their rates of return and periods between visits. For more information, see User retention.
Cohort analysis	Create and analyze custom cohorts or groups of users separated from other users by similar traits or actions. Analyze how many users

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Analysis (continued)

Module	Description
	perform specific sequences of actions, and how often they return to perform specified actions over a given time. For more information, see Cohort analysis in Usage Insights.
Conversion funnel	Create funnel reports to analyze user completion rates for a specific task. View conversion rates, the number of users progressing from one step to the next and the average time for users to advance to each step and complete the funnel. For more information, seeFunnel reports in Usage Insights.
Navigation paths	Visualize users' journeys through your application, discovering the most and least popular paths. For more information, see Navigation paths.

Data Foundation

Module	
Users	A list of users that you can filter, drill down into, and export.
Sessions	A list of sessions that you can filter, drill down into, and export.
Events	A list of user interactions such as page navigation and clicks that you can filter, drill down into, and export.
Pages	A list of visited pages on your instance that you can filter, drill down into, and export.

Events view

When you launch Usage Insights, it gives you an option to select the module from the drop-down list. Select the Web Embeddables module from the drop-down list and navigate to **Data Foundation** > **Events**.

The Events tab enables you to filter a list of tracked user interactions captured by all Web Embeddables components across enabled Usage Insights applications. It displays a list of user interactions such as name of component events, total occurrences, active users, and event type. You can also export the data.

In the Events search bar, enter `[WE]` to filter and display only Web Embeddables components in the list. This prefix identifies all embedded components tracked by Usage Insights and makes it easy to isolate Web Embeddables components from other application events.

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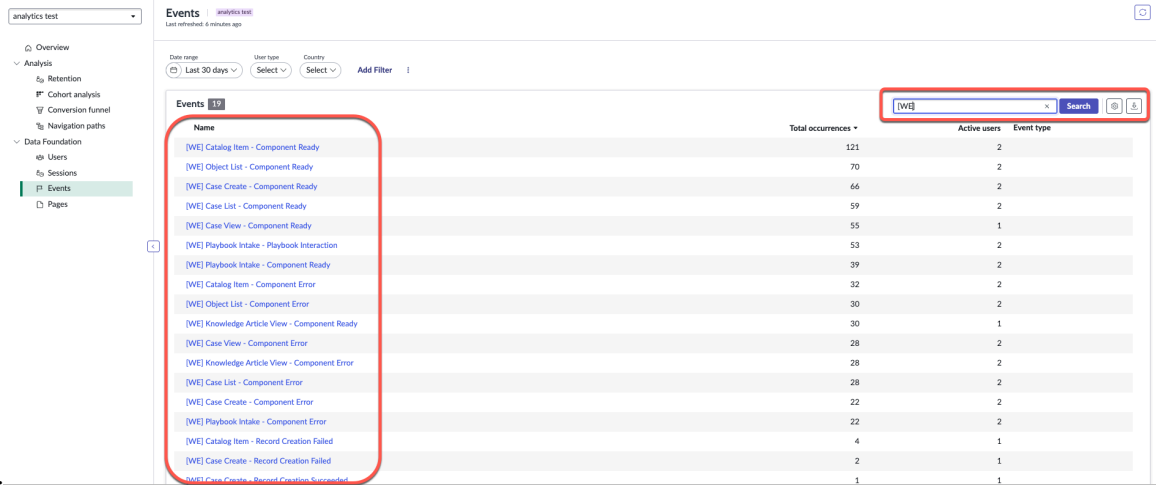
To narrow your search to a specific component, enter `[WE]` followed by the component name.



Event view of a component

The individual event view has more detailed information for a specified component.

Component usage KPIs

KPI	Description
Total occurrences	Displays the total number of times the event was triggered in a specified time.
[Event] trend	Displays the event usage trend over time and shows both active users and event occurrences. Use this chart to identify usage patterns and spikes in activity. Filter the view by: • Daily • Weekly • Monthly
Active users	Displays number of unique users who interacted with the component (triggered the event).
Event properties	Displays detailed breakdown of specific event attributes associated with the embedded component.

Global code structure

The global code generated for Web Embeddables includes key identifiers that enable analytics tracking:

- Module ID:
  - Captures events across all component instances within the module.
  - Groups usage data by module for consolidated analytics reporting.
  - Enables tracking of multiple embedded component instances that belong to the same module across different pages or contexts.
- Page title:

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- Captures page-level analytics to identify where components are embedded.
- Tracks user interactions based on the hosting page context.
- Helps you understand component performance across different external website locations.

Enable Usage Insights

Usage Insights is enabled by default for Web Embeddables. When you create a module, it registers with Usage Insights and begins to track component events. Sometimes it can take several hours for the module to get registered. This automatic registration ensures that usage data collection starts from the moment of deployment and allows you to monitor user interactions without additional configuration. For more information, see Enable Usage Insights.

You can also turn off the module by navigating to **Platform Analytics Administration** > **Usage Insights Apps** > **Settings**. Search and select your module, and uncheck the **Active** checkbox.

User consent for Usage Insights advanced tracking

Users can opt in or opt out of Usage Insights advanced tracking at any time through their user preferences. This setting gives users control over the collection of detailed interaction data, such as clicks, page views, and component usage patterns. For more information, see User privacy, tracking, and user consent management in Usage Insights.

Related topics

Web Embeddables component events

Guest user access for Web Embeddables

Enable unauthenticated users to access knowledge article and catalog items on your third-party website without logging in.

Understand the guest user support

Provide unauthenticated users with access to ServiceNow mobile Web Embeddables content on your website without requiring them to log in. Guest users can view knowledge articles and submit catalog items through direct links. They can access specific articles and catalog items that you designate as public, however, they cannot search for content or browse available items. This direct access approach gives you control over what guests can discover while providing targeted self-service.

When guests submit catalog items, the demo guest catalog item creates a case and captures their contact information.

Use access control lists (ACLs) to define what content guests can access and what actions they can perform. Configure which knowledge articles are public and which catalog items guests can submit. The system uses secure authentication to protect guest sessions and maintain data security throughout the interaction.

Activate guest user support

Activate the Web Components for Guest (sn_guest_component) plugin to enable guest user support on your website. For more information on how to activate the plugin, see Activate Web Embeddables. After you activate the plugin, copy the global code for your module. In your website's HTML file, paste the global code where the module is embedded. The updated global code enables guest sessions and handles authentication for visitors.

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Configure ACL for guest access

Enable guest users to access catalog items or knowledge articles by activating the required guest access control lists (ACLs).

Before you begin

You must activate the Web Components for Guest (sn_guest_component) plugin. For more information, see Activate Web Embeddables.

Role required: security_admin

About this task

Guest ACLs control what components and actions are available to guest users on your website. The guest ACLs make the Knowledge Article View and Catalog Item components accessible to guest users. They do not control access to specific knowledge articles or catalog items. Content-level access is managed separately through your knowledge base and catalog configuration. By default, all guest ACLs are inactive to ensure controlled access.

Activate only the ACLs that correspond to the components you want to make available to guests. For example, if you embed catalog item components on your website, activate the catalog item ACLs. If you embed knowledge article components, activate the knowledge ACLs. This selective activation ensures guests can access only the content and functionality you explicitly allow.

Procedure

1. In the filter navigator, enter `Access Control (ACL)`.
2. On the Access Controls page, in the Application column, enter `Web Components for Guest Embeddables`.
3. In the Description field, enter any of the following:
   - Enter `*[Guest Embeddables | Knowledge]` to view ACLs related to knowledge articles.
   - Enter `*[Guest Embeddables | Catalog Item]` to view ACLs related to catalog items.
4. In the Name column, search for and select the ACLs you need to activate.
5. In the ACLs page, select the **Active** check box.
6. Select **Update**.

Result

Guest users can now access the Knowledge Article View and Catalog Item components based on the ACLs you activated. These ACLs enable access to the components, not to specific knowledge articles or catalog items within them. The system applies these ACLs when guests interact with embedded components on your website.

Mobile-responsive Web Embeddables

Web Embeddables components automatically adapt their layout and controls for mobile devices to provide an optimized experience on phones.

Adaptive mobile interface

When you embed ServiceNow Web Embeddables components on your website or portal, they detect the device type and adjust their interface for mobile screens. This mobile-responsive design provides touch-friendly controls, reorganized layouts, and optimized interactions for smaller screens without requiring any configuration.

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The mobile-responsive experience activates automatically when users access your embedded components from mobile devices. Desktop users continue to see the standard layout, while mobile users get an interface specifically designed for touch interaction.

The following Web Embeddables components include mobile-responsive designs:

- Knowledge article view: Read knowledge articles with a mobile-optimized layout, touch-friendly language and version selectors, and content that reflows for narrow screens.
- Catalog item: Order catalog items using forms that adapt field layouts for mobile, with drop-down menus that open as bottom sheets and one-tap copy functionality for reference numbers.
- Case create: Create cases with mobile-optimized forms, touch-friendly controls, and easy-to-use confirmation screens with an option to copy case numbers for reference.

Knowledge Article view on mobile device

Access and view knowledge articles on your mobile phones with an interface optimized for smaller screens. The component automatically adapts its layout for touch devices, reorganizing the header, controls, and content to provide a better reading experience on mobile.

Mobile responsive for Knowledge article view component

The Knowledge article view component automatically adapts its layout when displayed on mobile devices. This mobile-responsive design provides an optimized reading experience with touch-friendly controls and layouts specifically designed for mobile phones.

When you access knowledge articles through Web Embeddables capability on a mobile device, it detects your screen size and adjusts the interface to fit mobile dimensions. While the article loads, you see a visual placeholder that shows where content will appear. The article page content, navigation controls, and selection options reorganize to provide better usability on touch devices.

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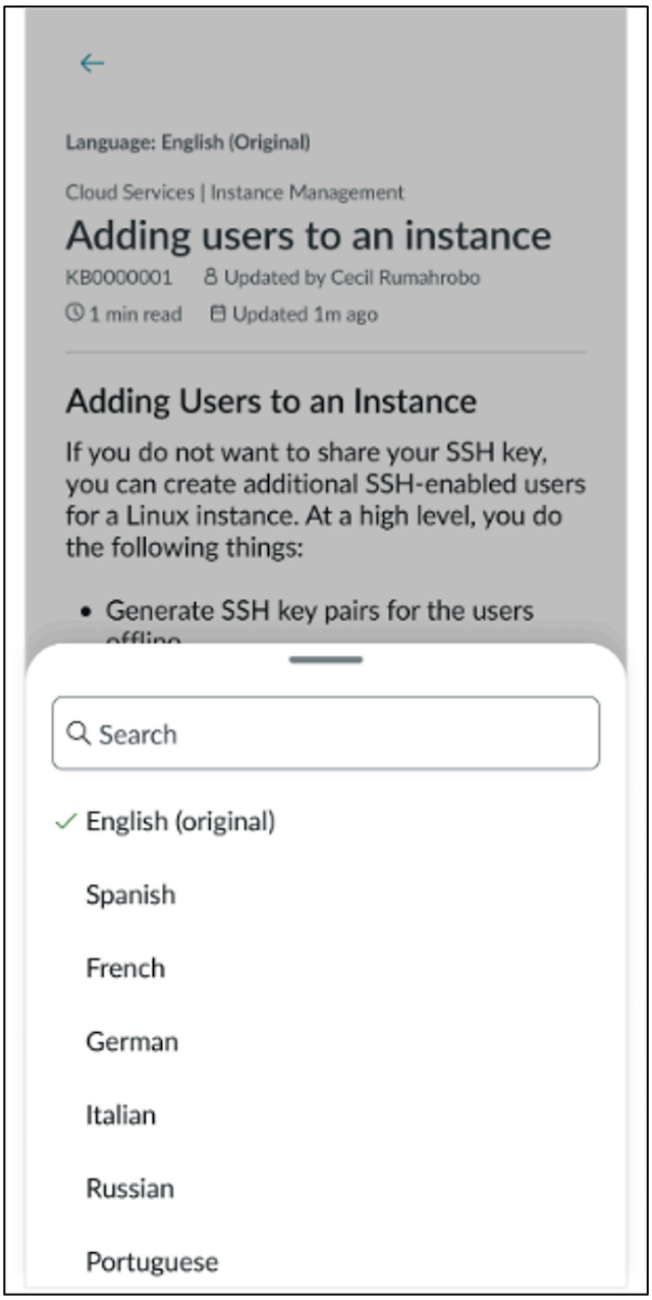
Knowledge article view component mobile view



Key capabilities

The key capabilities include:

- Adaptive layout: The component automatically switches to a mobile-optimized layout when displayed on phones or tablets. The header, content area, and controls adjust to fit mobile screen size.
- Touch-optimized selectors: Language and version selectors appear in the top action bar and open as bottom sheets slide-up panels that provide easy touch-based selection on mobile devices.
- Performance optimized: The mobile interface loads quickly and responds smoothly to user interactions.

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Catalog item component on mobile device

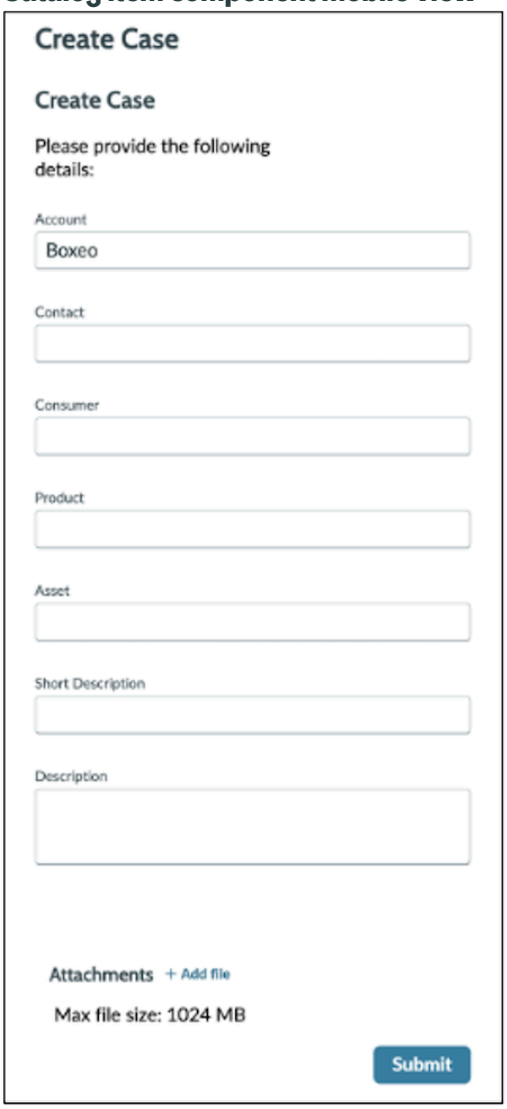
Order catalog items and services from your mobile devices with forms optimized for smaller screens and touch interaction.

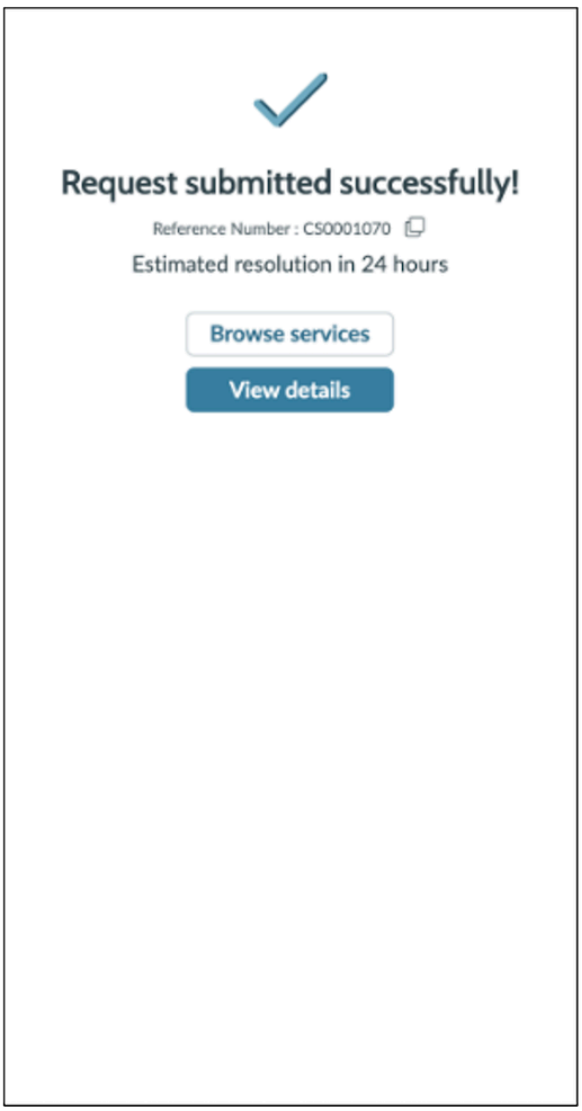
Mobile responsive for Catalog item component

The Catalog item component automatically adapts its layout when displayed on mobile devices. This mobile-responsive design provides an optimized ordering experience with touch-friendly options, reorganized form fields, and easy access to reference numbers.

When you access catalog items through Web Embeddables on your mobile device, the component detects your screen size and adjusts the form layout to fit mobile screen dimensions. While the form loads, you see a visual placeholder that shows where content will appear. Form fields, drop-down menus, and buttons reorganize to provide better usability on your mobile devices. After you submit your form, the system generates a reference number that you can copy with a single tap. When you select the copy ( ) icon, the reference number is copied to the clipboard, and the icon changes to a tick (✓) icon. Selecting the tick (✓) icon displays a `Copied to clipboard` message, which disappears after 3 seconds and the tick (✓) icon reverts to the copy ( ) icon.

Catalog item component mobile view





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Key capabilities

The following are the key capabilities:

- Adaptive form layout: Form fields automatically reorganize and wrap to fit mobile screen widths. The component adjusts field columns based on your device to maintain readability and ease of input.
- Touch-optimized selectors: Drop-down menus open as bottom sheets slide-up panels that provide easy touch-based selection on mobile devices. This makes it easier to choose options without struggling with small drop-down controls.
- Copy functionality: After submitting your form, you can copy the reference number with a single tap. The copy button displays a checkmark when the number is successfully copied to your clipboard.
- Visual feedback: The mobile interface shows a visual placeholder while the form loads and provides clear confirmation when you complete actions like copying reference numbers.

Case create component on mobile device

Create cases from mobile devices with a form interface that adapts to your mobile devices.

Mobile responsive for Case create component

Use the Case Create component on mobile devices to create cases with a form layout optimized for mobile devices.

The component automatically detects mobile devices and adjusts the form layout to fit smaller screens. Form fields reorganize to maintain readability, drop-down menus open as bottom sheets for easier touch interaction, and buttons are sized appropriately for mobile use.

After submitting a case, the system generates a case number. When you select the copy ( ) icon, the reference number is copied to the clipboard, and the icon changes to a tick (✓) icon. Selecting the tick (✓) icon displays a `Copied to clipboard` message, which disappears after 3 seconds and the tick (✓) icon reverts to the copy ( ) icon.

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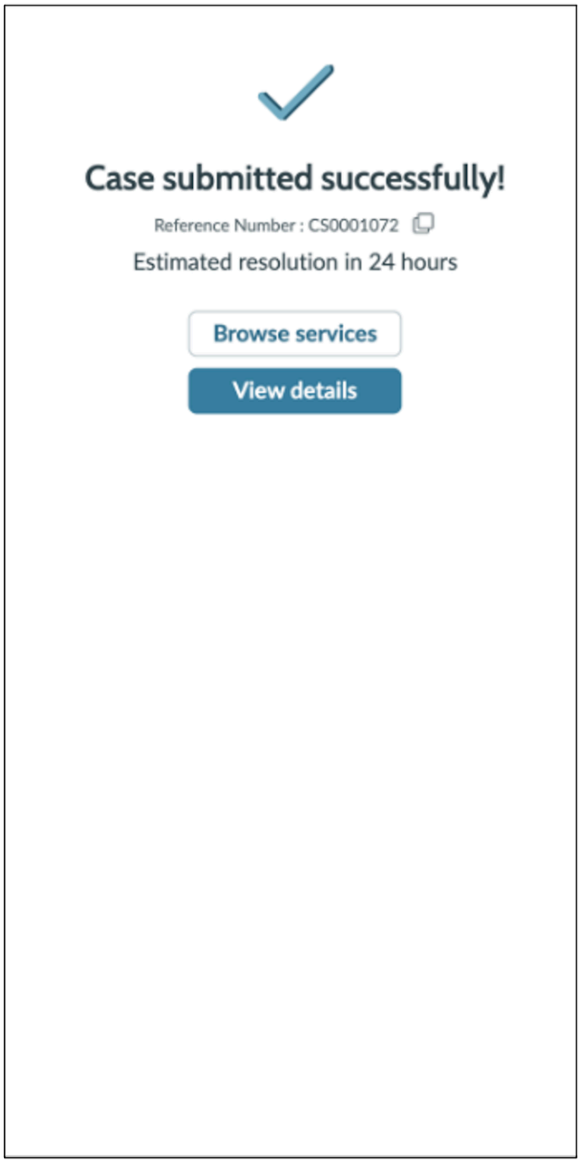
Case create component mobile view



Key capabilities

The following are the key capabilities:

- Adaptive form layout: Form fields automatically reorganize to fit mobile screen widths while maintaining readability and accessibility.
- Bottom sheet selectors: Drop-down menus open as bottom sheets on mobile devices, providing a touch-friendly selection interface that slides up from the bottom of the screen.
- Case number copy functionality: After case submission, copy the generated case number to your clipboard with a single tap. The system displays a confirmation message that automatically dismisses after 3 seconds.
- Loading indicators: A loading visual displays while the form loads to show the structure and placement of form elements.

Extend capabilities

To extend your Customer Service Management environment, integrate additional applications and features. This enhances functionalities and improves support for more efficient interactions.

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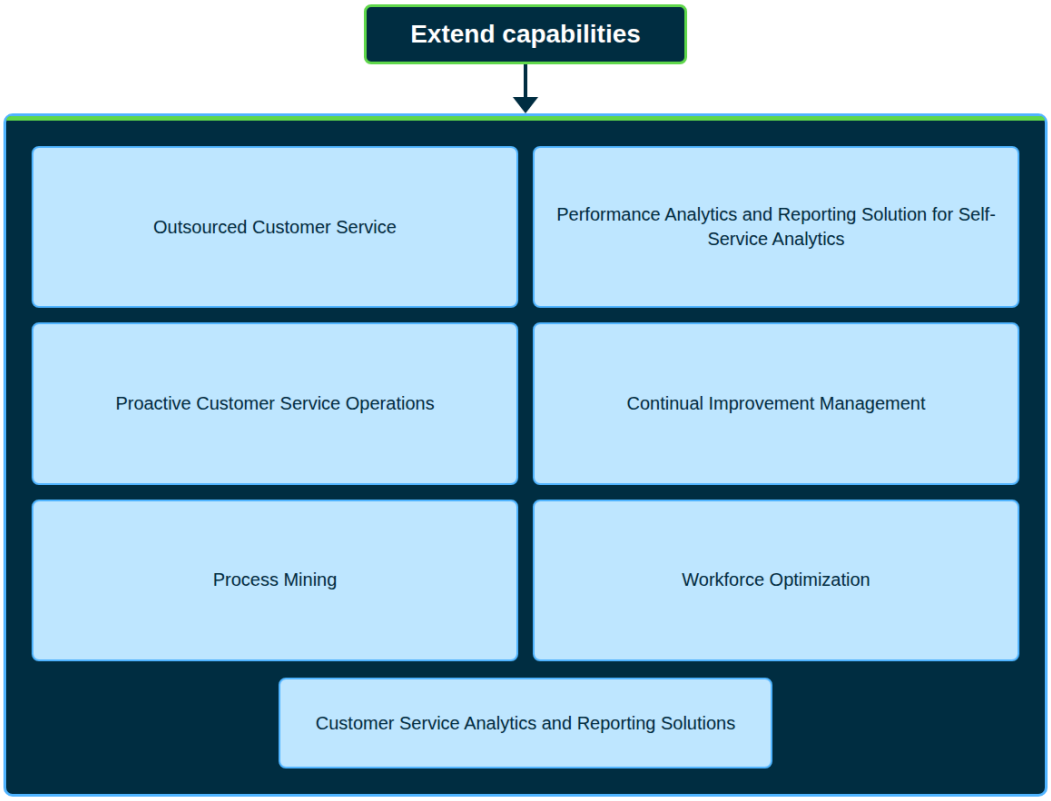
Extend capabilities overview



Setting up advanced features

Application or feature	Description
Outsourced Customer Service	Configure Outsourced Customer Service to enable the outsourced company or individuals to perform tasks, handle operations, or provide services.
Proactive Customer Service Operations	Configure Proactive Customer Service Operations to trigger case workflows and notify customers of any issues to resolve issues faster and lower inbound call volume.
Configure Customer Service Platform Analytics Solutions	Configure Customer Service Platform Analytics Solutions to view preconfigured dashboards with actionable data visualizations to improve your business processes.
Configure the Platform Analytics Solution for Self-Service Analytics for Customer Service	Configure Platform Analytics Solution for Self-Service Analytics to run diagnostics, review and customize components, and start collecting data.
Continual Improvement Management	Request improvement opportunities, and implement phases and tasks to meet performance goals, track progress, and measure success.

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Setting up advanced features (continued)

Application or feature	Description
Process Mining	Create automated business process flows from your data to help analysts and process owners to analyze and optimize their business processes.
Workforce Optimization for Customer Service	Manage and maintain the productivity of your workforce and efficiently route work to your team, manage your team's skills and schedules, and monitor their performance.

Outsourced Customer Service

Outsourcing is a business practice where an enterprise hires another company or individuals to perform tasks, manage operations, or provide services. These functions were previously handled by the enterprise's own employees.

Outsourced Service Providers (OSPs) are organizations engaged by enterprises to deliver customer service to external customers. These services can address various needs, including regional support, multilingual capabilities, and seasonal demand. Benefits of outsourcing services are as follows:

- Cost savings
- Increase support coverage
- Access to skilled expertise

Plugin

If you have the administrator role, you can activate the Outsourced Customer Service plugin (com.snc.outsourced_service_provider).

Note: The Outsourced Customer Service plugin (com.snc.outsourced_service_provider) requires the Case Management Core (com.sn_customerservice) plugin to get activated. The Outsourced Customer Service plugin is moved to the App Store beginning with Australia release.

The Outsourced Customer Service plugin adds the **Customer Service** > **Outsourced Customer Service** module to the application navigator. If you have the administrator (sn_csm_ocs.csm_ocs_admin) role, you can access this module. The administrator (sn_csm_ocs.csm_ocs_admin) can assign the following roles to users:

- sn_csm_ocs.ext_manager (external OSP manager)
- sn_csm_ocs.ext_agent (external OSP agent)
- sn_csm_ocs.manager (internal OSP manager)

Outsourced Customer Service Guided Setup

Activating the Outsourced Service Provider plugin adds the Outsourced Customer Service Guided Setup section. Navigate to **Outsourced Customer Service** > **Guided Setup** and use the tasks in this section to configure Outsourced Service Providers.

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Related topics

Set up Outsourced Customer Service

Outsourced Service Provider agent tasks

Outsourced Service Provider manager tasks

Roles for Outsourced Customer Service

Configure Outsourced Customer Service

Configure various components of Outsourced Customer Service based on the specific requirements of your organization.

Set up Outsourced Customer Service

Configure various aspects of Outsourced Customer Service based on the specific requirements of your organization.

Before you begin

Role required: sn_csm_ocs.csm_ocs_admin

About this task

There's a sequence of tasks that enable you to configure Outsourced Customer Service. You can perform these tasks based on the plugin you activated. Certain setup tasks apply only if you activated the Outsourced Customer Service plugin and this point is noted at the top of each task. To configure Outsourced Customer Service, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Outsourced Customer Service** > **Guided Setup**.
   The Outsourced Customer Service Guided Setup page is displayed.
2. On the Onboarding Outsourced Service Provider (OSP) window, select **Get Started**.
3. View the list of tasks to configure the feature.

Onboarding Outsourced Service Provider configuration tasks

Task	Description
Setup Outsourced Service Provider	Creates an OSP by specifying the internal manager and setting up transfer group. **Note:** Whenever an OSP is set up and mapped, it automatically creates a company record.
Setup Outsourcing Criteria	Defines outsourcing criteria based on account, consumer, asset, and sold product. OSP agents can view all the cases matching the outsourcing criteria. For example, consumer-based criteria can be defined for all Spanish speaking consumers and all consumers based out of Australia.
Onboard Manager	Onboard OSP manager for managing cases and agents. Once onboarding is complete, a password reset email is sent to the manager's email id.

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Task	Description
Setup Assignment Groups	Creates a group and associates it to an OSP manager. OSP manager assigns cases to the agents assigned to the group.
Onboard Agent	Onboard agents for an OSP for fulfilling cases. Once onboarding is complete, a password reset email is sent to the agents email id.

4. Go back to the Outsourced Customer Service Guided Setup page.
5. On the Case Routing and Assignment window, click **Get Started**.
6. View the list of tasks to configure the feature.

Case Routing and Assignment configuration tasks

Task	Description
Create Matching Rules	Rules to identify customer service cases that meet certain conditions.
Create Assignment Rules	Cases that meet certain conditions based on the rules created are routed to customer service agents.

7. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Define outsourcing criteria

OSP managers and agents view cases based on the defined outsourced criteria. Defining outsourcing criteria can be based on account, asset, consumer, or sold product. For example, consumer-based criteria could be defined for all Spanish speaking consumers and all consumers based out of Australia.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Outsourced Service Providers**.
2. Select the OSP name.
3. Select **Outsourcing Criteria** related list.
4. Select **New**.
5. Fill in the fields on the new record form, as appropriate.

Option	Description
Description	Description for the outsourcing criteria.
Table	The table that stores the task for which the outsourcing criteria is created. Select either **Account**, **Asset**, **Consumer**, or **Sold Product** tables.

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Option	Description
Condition	The conditions in which the outsourcing crite ria apply. Use the buttons in this field to build one or more conditions on the selected table. A con dition is made up of a selected field, an oper ator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by se lecting the **X** to the right of a condition.

6. Select **Submit**.
   OSP managers and agents can now view assigned cases which meet the condition under **All Cases**, **Unassigned Cases**, **My Cases**, and **Open Cases**. For example, if an OSP organization has been created with outsourcing criteria with the consumer table selected, an agent belonging to this OSP can view cases created by a consumer.

What to do next
Create groups and set assignment rules for the OSPs.

Create groups and assignment rules

An administrator creates groups and associates it to an OSP. This group is the default group to which the case is assigned to when an OSP agent transfers the unresolved case back to an enterprise.

Before you begin
Role required: admin

Procedure
1. Select an OSP you have created.
2. Go to **Groups** related list.
3. Click **New**.
4. Fill in the fields on the Outsourced Service Provider form, as appropriate.

Option	Description
Name	The OSP group name.
Group email	Group email distribution list or the email address of the group's point of contact, such as the group manager.
Manager	The OSP manager's name.
Type	Category for this group. For example, a group designated as type **cat alog** is a service catalog group and can also be accessed under the **Service Catalog** > **Catalog Policy** > **Fulfillment Groups** module.
Description	Helpful information about the group.

5. Click **Submit**.
6. Click **Group Staff** related list to view the list of members for the selected group.

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7. Click **Assignment Rules** related list to define assignment rules.
8. Click **Submit**.

Onboard Outsourced Service Provider staff

An administrator creates Outsourced Service Providers (OSPs) after which OSP managers and agents must be onboarded to manage and fulfill cases. As an administrator you can onboard both the OSP managers and agents.

Before you begin

Role required: user_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Outsourced Service Providers**.
2. Select an existing OSP.
3. Select the **Onboard Staff** related link.
4. Fill in the fields on the Outsourced Service Provider form, as appropriate.

Option	Description
First Name	The first name of the OSP manager or agent.
Last Name	The family name of the OSP manager or agent.
User ID	A unique ID for the OSP manager or agent.
Role	The role to onboard, such as an agent or a manager.
Email	The OSP manager or agent's email address.
Outsourced Service Provider	The OSP that you have selected.
Mobile Phone	The OSP manager or agent's mobile phone number.
Business Phone	The OSP manager or agent's business phone number.
Assignment Group	Select the group that was created while creat ing an OSP.

Note: A new OSP staff member record is created and the OSP is created in the **Organization** field of the external organization staff (formerly service organization external staff) [sn_csm_service_organization_external_staff] table. Additionally, the same including Onboard Agent, Onboard Manager, Create Group, Transfer Case, Register Staff , and Register Member.

5. Select **Submit**.
   The onboarded staff records are visible under the **Service Organization Staff** related list.

Note: Once onboarding is complete, a password reset email is sent to the manager's or agent's email address.

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Create an Outsourced Service Provider

An enterprise creates Outsourced Service Providers (OSPs) to provide customer service to external customers.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Outsourced Service Providers**.
2. Select **New**.
3. Fill in the fields on the Outsourced Service Provider form, as appropriate.

Option	Description
Name	The OSP's name.
Service Provider Type	Customer or Field service provider.
Manager	The OSP's manager name.
Website	The web address for the internal business lo cation.
Notes	Any note regarding the OSP.
Company	The company or organization to which the OSP belongs. **Note:** The **Company** field is a read-on ly field. Additionally, there's a 1:1 relation ship between an OSP and a company. It means that only one company record can be mapped to an OSP record at any given time.
Active	Enables the OSP. The default value is set to **True**.
Contact	Enter **Phone** or **Fax phone** number.
Address	The OSP's postal address. The following address fields are available by default: ○ Street ○ City ○ State/Province ○ ZIP/Postal Code ○ Country
Case Transfer	Search and select the **Case transfer group**, which is the default group to which the case is assigned when an OSP agent transfers the case.

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The following fields on the company record are automatically updated whenever you update them on the OSP record:

- **Name**
- **Street**
- **City**
- **State**
- **Zip/Postal Code**
- **Country**
- **Latitude**
- **Longitude**
- **Fax phone**
- **Phone**
- **Website**
- **Active**

4. Select **Submit**.

What to do next

Define outsourcing criteria so that cases matching the criteria are visible to the OSP managers and agents.

Related topics

Outsourced Service Provider agent tasks

Outsourced Service Provider manager tasks

Configure the Performance Analytics for the Outsourced Customer Service

Run diagnostics, review and customize components, and start collecting data.

Before you begin

A ServiceNow AI Platform administrator must have installed the content pack plugins or ServiceNow Store application for this Platform Analytics Solution.

Role required: pa_admin

Procedure

1. Run all diagnostics on all records, as described in Performance Analytics diagnostics. These diagnostics can catch many mismatches between the configuration of your Platform Analytics Solutions and your tables.
2. Navigate to **Performance Analytics** > **Administration Console**.
3. Click the **Dashboards** link in the **Explore and Manage** tile.
4. Verify the names of the dashboards that have been installed with this Platform Analytics Solution
5. Open the **Indicator Sources** tab.
6. For each dashboard included in this Platform Analytics Solution:

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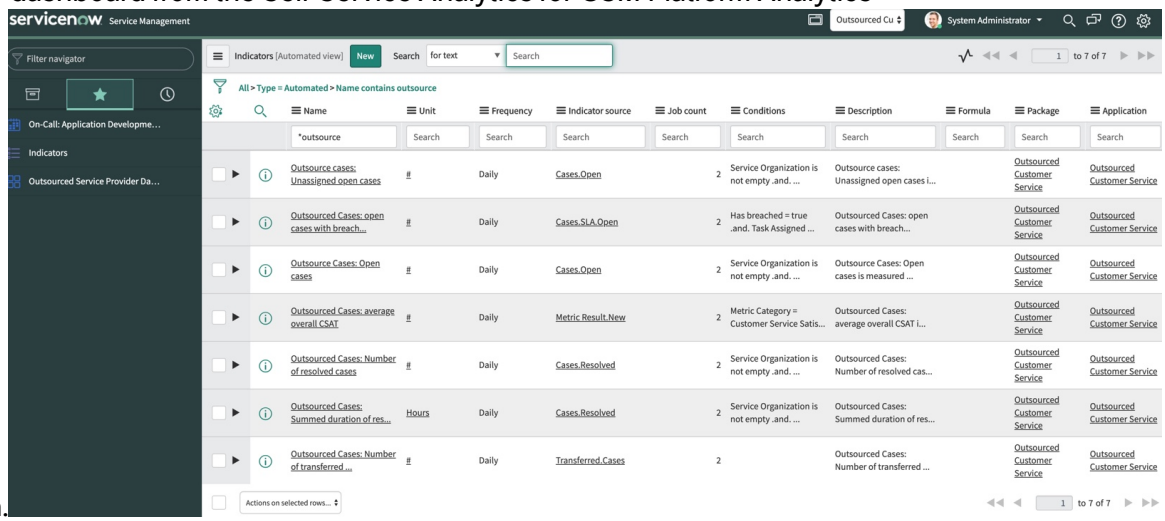
a. Filter the indicator sources on the dashboard name.

Example
This screenshot shows the indicator sources filtered on the Outsourced Service Provider dashboard from the Self-Service Analytics for CSM Platform Analytics Solution.



b. Review the facts table, conditions, and frequency of the indicator sources compared to the data structure on your own instance.

c. If necessary, open an indicator source and make corrections.

d. If you are editing an indicator source record, go to the Indicators related list and review the **Conditions** field for each indicator.
Changing the indicator source can also affect the additional conditions on the individual indicators.

7. If you changed the time field stamps in any indicator sources, also change any related Performance Analytics scripts.
8. Open the Breakdown Sources tab.
9. For each dashboard included in this Platform Analytics Solution:
   a. Filter the breakdown sources on the dashboard name.
10. Navigate to **Performance Analytics** > **Jobs**.
11. Set up and run the historical job for this Platform Analytics Solution, <name of historical job>.
12. Edit and activate the scheduled data collection job for this Platform Analytics Solution, <name of scheduled job>

Outsourced Service Provider dashboard

The Outsourced Service Provider dashboard enables monitoring of breached service-level agreements (SLAs), average resolution time, and case transfer percentages, among other metrics. You can utilize the insights to identify the areas of concern and to plan your case management strategy.

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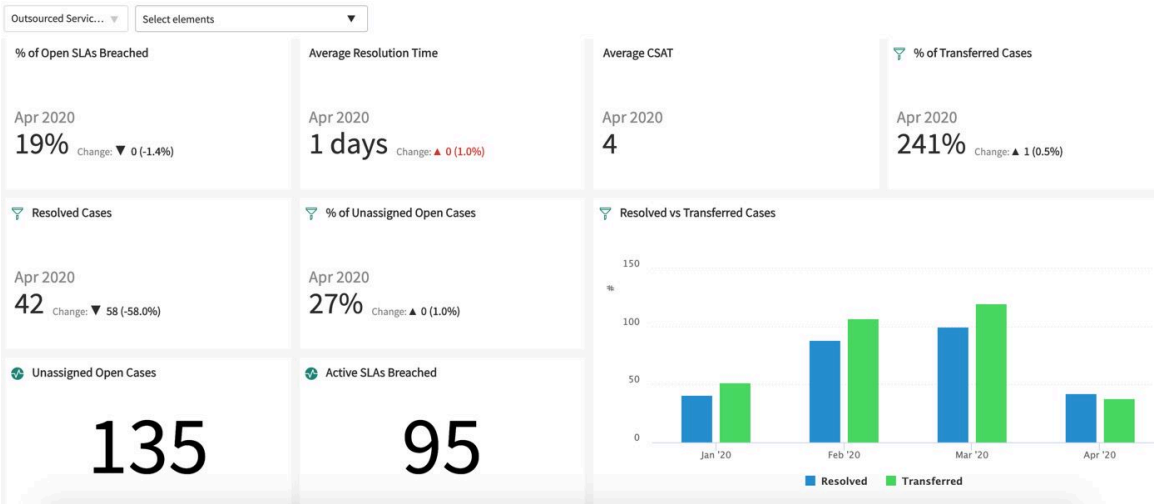
Important: Starting with the Xanadu release, the Outsourced Service Provider dashboard has a new, modernized look and feel.

To access the new Outsourced Service Provider dashboard, navigate to **All** > **Outsourced Customer Service** > **Analytics**, and select the outsourced service provider (OSP) name. Existing customers upgrading from earlier releases to the Xanadu release can also access the new Outsourced Service Provider dashboard.

However, existing customers on release versions prior to the Xanadu release can still view the old Outsourced Service Provider dashboard by navigating to **All** > **Outsourced Customer Service** > **Overview**.

Outsourced Service Provider dashboard



End user and roles

End user and goal	Required role
Internal OSP Manager	sn_csm_ocs.manager

Indicators

Outsource cases: Unassigned open cases

The number of open cases that are unassigned to the OSP agents.

Outsourced cases: open cases with breached SLAs

The number of cases that have remained open past the time required by the Service Level Agreement (SLA).

Outsource cases: open cases

The number of cases that are in the open state.

Outsourced cases: Average overall CSAT

Average customer satisfaction (CSAT) based on survey results. For more information about CSAT, see Customer service satisfaction surveys.

Outsourced cases: Number of resolved cases

The number of cases that the OSP agent has worked on and moved to resolved state.

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Outsourced cases: Summed duration of resolved cases

The total time taken by the OSP agents to resolve the cases.

Outsourced cases: Number of transferred cases

Number of cases that are transferred to an internal ServiceNow agent when an OSP agent couldn't resolve the case.

Global filter

The Outsourced Service Provider dashboard utilizes the outsourced service providers as global filters. You can select one or more outsourced service providers to view different metrics and reports. By default, the dashboard displays data from all outsourced service providers.

Reports

Title	Type	Description
Unassigned Open Cases	42	The number of cases that are in the open state and isn't yet assigned to an OSP agent. In this report, for example, there are 42 cases that are yet to be assigned. The OSP manager views the number of such cases at a glance and assigns them.
Active SLAs Breached	42	This report shows all breached SLAs that are still active In this report, for example, there are 42 such active SLAs. The OSP manager views the number of breached SLAs at a glance, which helps in taking immediate action.

Configure Proactive Customer Service Operations

Configure various aspects of Proactive Customer Service Operations based on the specific requirements of your organization.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

There are a sequence of tasks that enable you to configure Proactive Customer Service Operations. You can perform these tasks based on which plugin or application you have installed. This is noted at the top of each task.

Note: To use integration with Event Management, install the Proactive Customer Service Operations with Event Management plugin and the Event Management application from the ServiceNow store.

Event Management integration is only available if you are using the CSM Agent Workspace or the ServiceNow AI Platform interface.

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To configure Proactive Customer Service Operations, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**
3. In the Proactive Customer Service Operations category, view the list of tasks to configure the feature.

Proactive Customer Service Operations configuration tasks

Task	Description
Activate Proactive Customer Service Operations plugin (com.snc.proactive_cs_ops). **Note:** This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.	Activate the Proactive Customer Service plugin to use Proactive Customer Service Operations.
Activate Proactive Customer Service Operations with Event Management plugin (com.snc.proactive_cs_itom). **Note:** This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.	Activate the Proactive Customer Service Operations with Event Management plugin to enable integration with Event Management. This plugin automatically installs the Proactive Customer Service Operations plugin.
Install the Event Management application.	Install the Event Management application from the ServiceNow store.
Configure form views	Configure the form layout and related lists for the different views of the Case, Install Base Item, and Account forms to display the fields you require.
Activate an alert rule to automatically create a proactive case from an alert	Configure an alert rule to automatically create a proactive case when an incident is created from an alert that has one or more affected install base items. **Note:** This task is only applicable if you are using the integration with Event Management.
Configure proactive case flows	Automate workflows for proactive case creation to improve your operational efficiency and respond to customer issues faster. **Note:** This task is only applicable if you are using the integration with Event Management.

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4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Using Proactive Customer Service Operations

View install base information from the Customer Service Portal

Create a case for install base from the Customer Service homepage

View the install base in CRM Workspace

View sold product information in CRM Workspace

Proactive Customer Service Operations

Proactively trigger case workflows and notify customers of any issues to resolve issues faster and lower inbound call volume.

Proactive Customer Service Operations enables you to track the digital services sold to and in use by your customers. This is referred to as install base.

If you identify any service disruptions to a customer's install base, you can proactively create a case to notify them.

These cases are resolved and closed in the same way as customer-reported cases. When multiple customers are affected, you can use the major issue management process.

You can also associate outage information to a case to keep your customers informed about the impact of the outage and the status of the resolution. It also gives customers visibility into planned service disruptions, enhancing transparency and reducing the number of customer-reported cases.

Your customers can use the Customer Service Portal to view proactive cases that you opened on their behalf, any outages associated with their install base, and interact with you using the proactive case. Business organization staff can view outage information for their install base items on the Business Organization Support Portal (BOSP). For more information, see Track outages on the Business Organization Support Portal.

The Proactive Customer Service Operations plugin (com.snc.proactive_cs_itom) provides an integration between Customer Service Management and the Event Management console in IT Operations Management. For more information, see Integration with Event Management.

Before you begin

Meet with your stakeholders to define your requirements. Depending on your requirements, you can activate either the Proactive Customer Service Operations plugin or the Proactive Customer Services with Event Management plugin.

Note: The Proactive Customer Service Operations with Event Management plugin provides all the features included in the Proactive Customer Service Operations plugin as well as additional features from the Event Management console in IT Operations Management.

Activation information

To enable Proactive Customer Service Operations, activate the Proactive Customer Service Operations plugin (com.snc.proactive_cs_ops).

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To enable Proactive Customer Service Operations with Event Management, activate the Proactive Customer Services with Event Management plugin (com.snc.proactive_cs_itom).

To use Proactive Customer Service Operations for Business Organizations, you must have the Business Location plugin (com.snc.business_location). For more information, see Configure proactive case flows for business organizations and Using Proactive Customer Service Operations for business organizations.

For detailed steps on getting started with Proactive Customer Service Operations, see Configure Proactive Customer Service Operations.

Related topics

Major issue management overview

Configure install base

Configure proactive case flows for accounts

Configure proactive case flows for business organizations

Outage tracking for install base

Provide visibility into any current or upcoming outages affecting a customer's install base, enhancing transparency and reducing the number of customer-reported cases.

Outage definition

An outage refers to a time period that a service delivering value to a customer is unavailable or experiencing performance issues.

A customer can experience the following types of outages:

- Unplanned outage: Outages such as those caused by hardware or network issues.
- Planned outage: Outages caused by planned maintenance or upgrades.
- Degradation: Problems affecting a service that does not result in a disruption of that service.

Outage tracking overview

Proactively inform customers about planned or unplanned service disruptions by associating outages with a case. In doing so, your customers are aware of the impact of the outage and have visibility into the resolution status. They can then use this information to assess the business impact of different outage types over a period and calculate any charge backs, if necessary.

Outages are typically created automatically when an alert is created for a service or by service fulfillers when working on an incident.

An outage specifies the outage type, impacted service as well as the begin and end time. Multiple services used by a customer can be associated with an outage.

Roles

As a major issue manager or customer service manager, you can create, associate, and track all outages related to a case. Customer service managers can also view reports of business impact by outage type.

As a customer service agent, you can view any outages associated with the case.

Your customers can view outage information on the Customer Service Portal.

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Activation information

This feature requires the Proactive Customer Service Operations Management plugin (com.snc.proactive_cs_ops).

Related topics

- Associate an outage to a major case
- Create an outage from a major case
- Track outages for install base items
- Proactive Customer Service - Advanced dashboard
- View install base information from the Customer Service Portal

Integration with Event Management

Create cases proactively from alerts either manually or through automation. Track the accounts and health status of the corresponding install base items affected by the alert to better correlate customer issues and provide faster responses.

Customer Service Management provides an integration with the Event Management console in IT Operations Management, which enables you to improve the customer experience by breaking down the silos that exist between the processes and systems used by front line customer service and back-office operations teams. By monitoring issues and creating cases proactively, you can be one step ahead of your customers and solve issues faster.

Network Operations Center (NOC) operators monitor alerts from the Service Operations Workspace. For more information, see Monitor service health.

When alerted to a service disruption, they can identify the accounts and corresponding install base items affected and create a case for customer service to review. Customer service can view the customers affected and notify#hem.

Customer service agents and managers can also track the service health status of install base items for an account to provide faster and more accurate support to customers.

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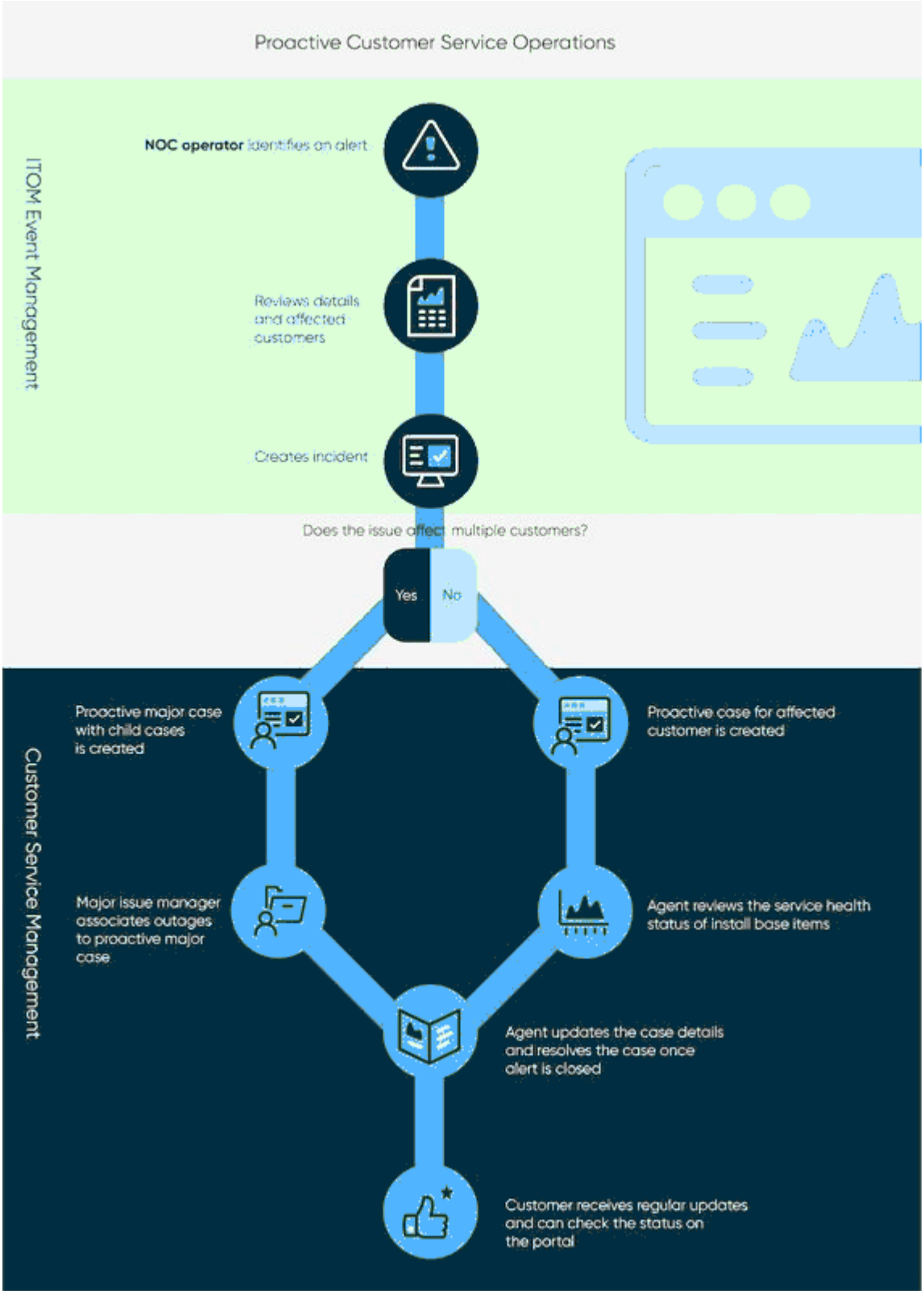
Overview of Proactive Customer Service Operations with Event Management



Learn about Proactive Customer Service Operations with Event Management from the following video tutorial.

Note: This video was recorded in the New York release.

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Activation information

To enable Proactive Customer Service Operations with Event Management, activate the Proactive Customer Service with Event Management plugin (com.snc.proactive_cs_itom).

Service health status for install base

View the real-time health status of a customer's install base. Correlate customer issues with the operational health of their install base to provide more informed responses to your customers.

Service health tracking overview

The integration between Customer Service Management and the Event Management console in IT Operations Management enables you to track the service health status of a customer's install base.

When an issue affects one or more install base items and an alert is created, the severity of the alert is calculated in Event Management. It is calculated according to alert impact calculation rules. Based on the severity of the alert, the service health status of each install base item is calculated. Customer service agents can view the service health status of install base items in an account or a case in Customer Service Management.

For more information about how the severity of an alert is calculated, see Alert impact calculation.

To provide the service health status for an install base item in Customer Service Management, the following fields are mapped.

Event management fields for calculating alerts

Event Management (em_impact_status table)	Customer Service Management (sn_install_base_item table)
Business Service	Service Context
Element Identifier	Configuration Item
Severity	Health Status

Note: The service health status is displayed only if the install base item has both a Configuration Item (CI) and a service context associated with it. Service context is the application service associated with the underlying CI for impact calculation in Event Management. For more information about application services, see Lesson 2 of the Event Management operator guide.

The service health status is displayed in Customer Service Management as follows.

Health status alerts

Severity of alert (Event Management)	Service health status on Account and Case forms (Customer Service Management)
Critical	Critical: Resource is either not functional or critical problems are imminent.
Major	Major: Major functionality is severely impaired or performance has degraded.

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Health status alerts (continued)

Severity of alert (Event Management)	Service health status on Account and Case forms (Customer Service Management)
Minor	Minor: Partial, non-critical loss of functionality or performance degradation occurred.
Warning	Warning: Attention is required, even though the resource is still functional.
Info	Normal: No severity. An alert is created. The resource is still functional.
Clear	Normal
Empty/Null	Not Available

For more information about alert severity, see Lesson 1 of the Event Management operator guide.

Roles

As a system administrator, configure form views to add the **Service Context**, **Health Status**, and **Health Status Last Updated** fields to the relevant forms.

As a customer service agent, view the service health status of install base items on the Account or Case form.

Activation information

This feature requires the Proactive Customer Service Operations with Event Management plugin (com.snc.proactive_cs_itom).

Related topics

Integration with Event Management

Configure form views for Proactive Customer Service Operations

Track the service health of install base items in Agent Workspace

Activate Proactive Customer Service Operations

Activate the Proactive Customer Service plugin to use Proactive Customer Service Operations.

Before you begin

Role required: admin

About this task

Proactive Customer Service Operations is only available for customers who are licensed for the Customer Service Management application.

To activate Proactive Customer Service Operations, activate the Proactive Customer Service Operations Management plugin (com.snc.proactive_cs_ops). This plugin is not active by default.

Note: This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.

Activating this plugin also installs the Major Issue Management, Customer Service Install Base Management, Customer Service with Service Management, Customer Service Case Action Status, and Task-Outage Relationship plugins.

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.snc.proactive_cs_ops.
3. Click **Activate**.

Activate Proactive Customer Service Operations with Event Management

Activate the Proactive Customer Service Operations with Event Management plugin to use Proactive Customer Service Operations with Event Management.

Before you begin

Role required: admin

About this task

Proactive Customer Service Operations with Event Management is only available for customers who are licensed for the Customer Service Management application.

To activate Proactive Customer Service Operations with Event Management, activate the Proactive Customer Service with Event Management plugin (com.snc.proactive_cs_itom). This plugin is not active by default.

Note: This is a ServiceNow Store plugin. You must install this plugin separately from the ServiceNow Store.

Activating this plugin also activates the Proactive Customer Service Operations (com.snc.proactive_cs_ops) and Event Management (com.glideapp.itom.snac) plugins.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.snc.proactive_cs_itom.
3. Click **Activate**.

Configure form views for Proactive Customer Service Operations

Configure the form layout and related lists for the different views of the Case, Install Base Item, and Account forms to display the fields you require.

Before you begin

Role required: admin

Certain fields on the forms can only be added if you have activated the Proactive Customer Service Operations with Event Management plugin. This is noted in the following table.

Procedure

1. Navigate to **Customer Service**.
2. Add the following fields to forms and related lists, as required.

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Configure form views

Form	Procedure
Case	**a.** Click **Cases** > **Proactive**. **b.** Add the **Proactive** field to the **Proactive Case** and **Workspace** view, and other views as required: ▪ **Proactive** ▪ **Alert** **Note:** The **Alert** field is only available if you have activated the Proactive Customer Service Operations with Event Management plugin. **c.** **Note:** This only applies if you have activated the Proactive Customer Service Operations with Event Management plugin. Add the following fields to the **Affected Install Base Items** related list, **Proactive Case** and **Workspace** view, and other views as required. ▪ **Health Status** ▪ **Health Status Last Updated**
Account	**Note:** This only applies if you have activated the Proactive Customer Service Operations with Event Management plugin. **a.** Click **Customer** > **Accounts**. **b.** Add the following fields to the **Install Base Items**related list for the **Case** and **Workspace** views, and other views as required. ○ **Health Status** ○ **Health Last Updated**
Install Base Item	**Note:** This only applies if you have activated the Proactive Customer Service Operations with Event Management plugin. **a.** Click **Products** > **Install Base Items**. **b.** Add the **Service Context** field to the **Default** and **Workspace** views.

Activate an alert rule to automatically create a proactive case from an alert

Configure an alert rule to automatically create a proactive case when an incident is created from an alert that has one or more affected install base items.

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Before you begin
Role required: evt_mgmt_admin

About this task

Note: This task is only applicable if you are using the integration with Event Management.

Procedure

1. Navigate to **All** > **Event Management** > **Rules** > **Alert Management**.
2. Click **Create Proactive Case**.
3. Select the **Active** check box.
4. Click **Update**.
   When an incident is created from an alert that contains affected install base items, a case is automatically created. The case number is added to the **Case** field on the Alert form.

Configure proactive case flows for accounts

Automate workflows for proactive case creation to improve your operational efficiency and respond to customer issues faster.

Before you begin
Role required: admin

About this task

Note: This task is only applicable if you are using the integration with Event Management.

Configure the flow designer to automate the next steps in processing a proactive case. You can automate that a proactive case is proposed to a major case or is directly promoted to a major case. If promoted directly to a major case, child cases are automatically created when multiple customers are impacted.

If a single account is affected, you can also automate that an account and primary contact are associated to a case.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Proactive Case Flows**.
2. Click the **Process Proactive Cases Created from Alerts** flow.
3. Click the **Process Proactive Cases for Single and Multiple Accounts** subflow.
4. In the **Major Case Status** field, set the initial status of the major case for multiple accounts.
   By default, this field is set to **None**. Based on your selection, the proactive case is either **Proposed**, **Accepted**, or **None**. If you set the status to **Accepted**, child cases are created automatically.

   For more information on the major issue management, see Major issue management overview.
5. In the **Affected Account Threshold** field, enter the number of affected accounts required for a proactive case to be eligible for major case processing.
   The default is two.
6. Select the **Process Case for Single Account** check box to associate an account and primary contact to the case if a single account is affected.
   This also applies if multiple install base items from the same account are affected.
7. Click **Done**.

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Configure proactive case flows for business organizations

Automate workflows for proactive case creation to improve your operational efficiency and respond to business organizations issues faster.

Before you begin

Note: To use Proactive Customer Service Operations for business organizations, the Business Location (com.snc.business_location) and Proactive Customer Service Operations with Event Management (sn_pro_cs_itom) plugins are required.

Role required: admin

About this task

Digital services used by businesses organizations, referred as Install Base Items, are supported as affected install base items in the proactive and major cases.

Modify the default configuration of processing a proactive case according to your business requirement. You can automate that a proactive case is proposed to a major case or is directly promoted to a major case. If promoted directly to a major case, child cases are automatically created when multiple customers are impacted. For more information on the major issue management, see Major issue management overview.

Note: When using proactive customer service with business organizations, keep the install base items for business organizations separate from the install base items for accounts. In other words, don't use a single configuration item for both accounts and business organizations.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Proactive Case Flows**.
2. Select the **Process Proactive Cases Created from Alerts** flow.
3. Select the **Process Proactive Cases for Single and Multiple Business Organizations** subflow.
4. In the **Major Case Status** field, set the initial status of the major case for multiple business organizations.
   By default, this field is set to **Proposed**. Based on your selection, the proactive case is either **Proposed**, **Accepted**, or **None**. If you set the status to **Accepted**, child cases are created automatically.

   For more information on the major issue management, see Major issue management overview.
5. In the **Affected Business Organization Threshold field** field, enter the number of affected business organizations required for a proactive case to be eligible for major case processing. The default is two. If the count of Business Organizations is greater than or equal to the affected business organization threshold, and major case status is set to proposed, then the case is proposed as a major case and a work note is added about the same in the case.
6. Select the **Process Case for Single Business Organization** check box to update impacted business organization in the **Requestor Organization** field on the proactive case.
   This also applies if multiple install base items from the same Business Organization are affected.
7. Select **Done**.

Related topics

Proactive Customer Service Operations

Major issue management overview

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Configure Customer Service Platform Analytics Solutions

Enable Customer Service Platform Analytics Solutions to view preconfigured dashboards with actionable data visualizations to improve your business processes.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Performance Analytics** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Customer Service category, view the list of tasks to configure the feature.

Performance Analytics for configuration tasks

Task	Description
Activate Performance Analytics for Customer Service Management	Activate the Performance Analytics - Content Pack - Customer Service (com.snc.pa.customer_service) plugin to add Performance Analytics configuration records to your instance.
Review Indicator Sources	Review the provided indicator sources to ensure they match your Customer Service application table structure.
Review Indicators	Review the provided indicators to ensure that the metrics you want to measure are tracked.
Review Breakdown Sources	Review the provided breakdown sources to ensure they match your table structure and include the elements you want.
Review Breakdowns	Review breakdowns to ensure that you can filter scores by the appropriate elements.
Collect Data	Run historical data collection once to collect scores on existing data, and enable scheduled data collection to begin collecting scores on new data automatically.
View Analytics Hub	View the Analytics Hub for indicators that you collected data for to begin exploring your scores.
View Dashboards	View the provided dashboards to get an overview of your scores and view multiple metrics in a single location.

4. To perform a task, click **Configure**.

   This button opens the page in your instance where the configuration is completed.

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Configure the Platform Analytics Solution for Self-Service Analytics for Customer Service

Run diagnostics, review and customize components, and start collecting data.

Before you begin

Role required: pa_admin

A ServiceNow AI Platform administrator must have installed the content pack plugins or ServiceNow Store application for this Platform Analytics Solution.

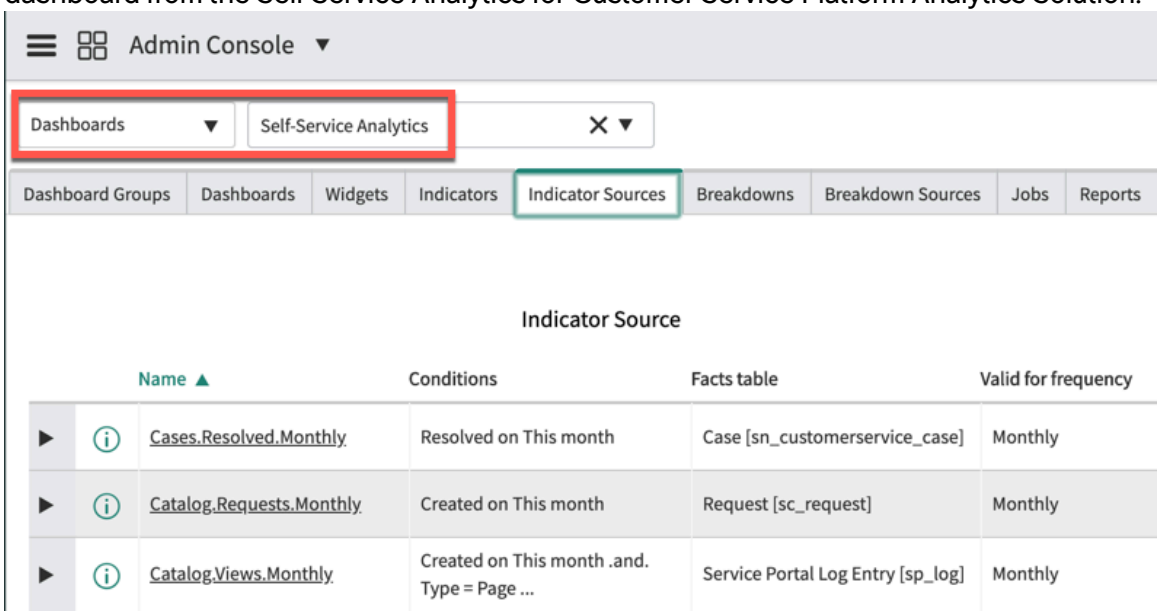
Procedure

1. Run all diagnostics on all records, as described in Performance Analytics diagnostics. These diagnostics can catch mismatches between the configuration of your Platform Analytics Solutions and your tables.
2. Navigate to **Performance Analytics** > **Admin Console**.
3. Click the **Dashboards** link in the **Explore and Manage** tile.
4. Verify the names of the dashboards that have been installed with the Self-Service Analytics Platform Analytics Solution.
5. Open the **Indicator Sources** tab.
6. For each dashboard included in this Platform Analytics Solution:

   a. Filter the indicator sources on the dashboard name.

   Example

   This screenshot shows the indicator sources filtered on the Self-Service Analytics dashboard from the Self Service Analytics for Customer Service Platform Analytics Solution.



   b. Review the facts table, conditions, and frequency of the indicator sources compared to the data structure on your own instance.

   > **Important:** Pay particular attention to time stamp fields such as Resolved or Created that are referenced in the **Conditions** field. You may need to use different time stamp fields.

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c. If necessary, open an indicator source and make corrections.

d. If you are editing an indicator source record, go to the Indicators related list and review the **Conditions** field for each indicator.
Changing the indicator source can also affect the additional conditions on the individual indicators.

7. If you changed the time field stamps in any indicator sources, also change any related Performance Analytics scripts.
8. Open the Breakdown Sources tab.
9. For each dashboard included in this Platform Analytics Solution:
   a. Filter the breakdown sources on the dashboard name.
   b. Review the conditions on the breakdown source.
10. Navigate to **Performance Analytics** > **Jobs**.
11. Set up and run the historical job for this Platform Analytics Solution, [SSA] Self-Service Analytics Data Collection.
12. Edit and activate the scheduled data collection job for this Platform Analytics Solution, [SSA] Self-Service Analytics Data Collection.

Related topics

Platform Analytics Solutions for Self-Service Analytics for Customer Service

Self-Service Analytics

Activate the Self-Service Platform Analytics Solution

Activate the content pack plugins or ServiceNow Store application for the Platform Analytics Solution.

Before you begin

Activate the full, subscription version of Performance Analytics on the instance where you are activating this Platform Analytics Solution. You can activate Performance Analytics on a sub-production instance without purchasing a subscription. For more information, see Activate your Performance Analytics subscription.

Note: The data for the Communities and Virtual Agent tabs on the Self-Service Analytics dashboard are generated when the Communities plugin (com.sn_communities) and Glide Virtual Agent plugin (com.glide.cs.chatbot) are activated respectively.

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for Self-Service Analytics for Customer Service plugin (com.snc.pa.self_service_analytics_csm).
3. Install the application.
   When you install this application, you also activate the following plugins:
   - Case Management Core (com.sn_customerservice)
   - Self-Service Analytics PA (com.snc.pa.self_service_analytics)
   - Self-Service Analytics Core (com.snc.self-service_analytics_core)

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Related topics

List of plugins (Paris)

Optimize workforce operations

Enable Workforce Optimization for Customer Service and configure settings to use the Channel Management, Scheduling, Teams, and Coaching applications.

Activate Workforce Optimization for Customer Service

Workforce Optimization for Customer Service solution is highly modular, offering a wide range of capabilities such as Channel Management, Scheduling, Coaching, and Teams applications in CSM Manager Workspace. The Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) plugin activates all other dependent plugins to enable users to the Channel Management, Scheduling, Coaching, and Teams applications in Workforce Optimization for Customer Service.

Before you begin

The Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) plugin is available with the CSM Enterprise subscription package. To get access to all new features available with the new configurable workspace, activate the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) plugin.

Role required: admin

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the plugin using the filter criteria and search bar.

   You can search for the plugin by its name or ID. If you cannot find a plugin, you might have to request it from ServiceNow personnel.

3. Select **Install** to start the installation process.

   Note: When domain separation and delegated admin are enabled in an instance, the administrative user must be in the **global** domain. Otherwise, the following error appears: `Application installation is unavailable because another operation is running: Plugin Activation for <plugin name>.`

   You will see a message after installation is completed. For information about the components installed with a plugin, see Find components installed with an application.

Components installed with Workforce Optimization for Customer Service

Several types of components are installed with activation of the CSM Configurable Workspace (sn_csm_wfo_workspa) plugin, including user roles, key performance indicators (KPIs), scheduled jobs, properties, and tables.

Workforce optimization for customer service

Roles

Role title [name]	Description	Contains roles
Workforce Optimization User [sn_wfo.user]	Grants read access to primary group and additional managers.	pa_analyst

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Roles (continued)

Role title [name]	Description	Contains roles
Workforce Optimization Admin [sn_wfo.admin]	Grants administrative rights to create, read, update, and delete (CRUD) additional managers.	sn_wfo.user
Workforce Optimization CSM Manager [sn_csm_wfo_workspa.manager]	Grants rights to create, read, or update, coaching, scheduling, teams, or channel management applications.	• sn_mgr_workspace.manager • sn_customerservice_manager • sn_wfo.user • sn_channel_mgmt.user • sn_shift_planning.admin • sn_coaching.coach • sn_sre.user • sn_team_perf.team_performance_user
Workforce Optimization CSM Admin [sn_csm_wfo_workspa.admin]	Grants administrative rights to create, read, update, and delete (CRUD) coaching, scheduling, teams, or channel management applications.	• sn_team_perf.team_performance_admin • sn_coaching.admin • skill_model_admin • sn_channel_mgmt.admin • sn_csm_wfo_workspa.manager • sn_mgr_workspace.admin • sn_sre.admin

Filter Configuration

Module Name	Module Tables / Database View
Manager Workspace	Stores filter configurations for all applications such as Channels, Schedule, and Coaching. [sn_mgr_workspace_filter_configuration]
Schedule	• User [sys_user] • User Skill [sys_user_has_skill] • Agent Schedule [sys_shift_planning_agent_schedule] • Schedule Event [sn_shift_planning_event] • Manager Groups database view [sn_wfo_manager_group]
Coaching	• Skill [cmn_skill] • Skill Category M2M [cmn_skill_m2m_category] • Group Member [sys_user_grmember]

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Filter Configuration (continued)

Module Name	Module Tables / Database View
Channels	Manager Groups database view [sn_wfo_manager_groups]

Manager workspace

Roles

Role title [name]	Description	Contains roles
Manager Workspace User [sn_mgr_workspace.user]	Grants read access to home and list modules.	workspace_user
Manager Workspace Manager [sn_mgr_workspace.manager]	Grants read access to primary group, additional managers, and the approval button.	• sn_mgr_workspace.user • sn_wfo.user
Manager Workspace Admin [sn_mgr_workspace.admin]	Grants administrative rights to create, read, update, and delete (CRUD) all applications and settings in Manager Workspace.	• sn_mgr_workspace.manager • workspace_admin • ui_builder_admin

Properties

Properties	Description
cnm_skills.ws_max_users_swap_skill_matrix	The maximum limit for the number of users that allows you to swap axes in the skill matrix. • **Type:** Integer • **Default value:** 50

Reports

Indicator Name	Description
Total Open Cases	Total number of open that cases are waiting to be worked on by agents. The total count is divided into **New**, **Open** and **Awaiting info** cases.
Waiting Work Items	Total count of cases and interaction that are in queue to be assigned to agents.
Help Requested	Number of interactions for which agents requested for help.
Total Agents	All the agents that you manage. The total count is divided into **Available**, **Break**, **Away** and **Offline** agents.
Time-off Requests	Requests made by agents to take time-off from work.
Shift Swap Requests	Requests made by agents to swap shifts with other agents.
Open Cases	Graphs depicting cases waiting to be worked on, featured by open case type and age.

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Reports (continued)

Indicator Name	Description
Critical Open Cases	Number of critical open cases.

Performance analytics Indicators

Indicator Name	Description
No. of cases resolved on first contact	Number cases resolved the first time it was handled.
No. of cases not updated in last 30 days	Number of cases that are not updated since 30 days.
No. of resolved cases reopened	Number of cases reopened because issues were not addressed properly.
No. of escalated open cases	Number of cases that are not worked on and are escalated.

Scheduled jobs

Scheduled job	Description
[CSM Manager Workspace] Daily Data Collection	Runs the job daily and collects data for all teams indicators.
[CSM Manager Workspace] Historic Data Collection	Runs the job and collects historic data for all teams indicators.
[CSM Manager Workspace] Weekly Data Collection	Runs the job weekly and collects data for all indicators in Manager Workspace.

Channel management

Roles

Role title [name]	Description	Contains roles
Channel Management User [sn_channel_mgmt.user]	Grants read access to channel reports, channel view, and queue report tables.	awa_manager
Channel Management Admin [sn_channel_mgmt.admin]	Grants administrative rights to create, read, update, and delete (CRUD) channel reports, channel view, and queue report tables.	• sn_channel_mgmt.user • awa_admin • sn_wfo.admin • report_admin

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Interactive filters for reports

Interactive Filter Name	Description	Reference Table
Channel Management Agent Filter	Filters reports based on an agent.	[sys_user]
Channel Management Group Filter	Filters reports based on groups.	[sys_user_group]
Channel Management Queues Filter	Filters reports based on queues.	[awa_queue]
Channel Management Service Channel Filter	Filters reports based on service channels.	[awa_service_channel]

Reports for service channels and queues

Report Name	Description
Agents available to take case work items	Number of available agents to take case work items.
Interaction Work Items Assigned Today	Number of interaction work items assigned on any given day.
Abandoned Interaction Work Items	Number of abandoned interaction work items.
Case Work Items Assigned Today	Number of case work items assigned on any given day.
Average CSAT Score	Average customer satisfaction score.
Case Work Items Resolved Today	Number of case work items resolved on any given day.
Interaction Work Items Resolved Today	Number of interaction work items resolved on any given day.
Average Handling time for Interaction Work Items	Average time for handling interaction work items.
Agents Available to take Interaction Work Items	Number of available agents to take interaction work items.
Case Work Items Closed Today	Number of case work items closed on any given day.

Reports for agents

Report Name	Description
Active Chats	Number of ongoing chat conversations.
Chats Completed Today	Number of chats completed on any given day.

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Reports for agents (continued)

Report Name	Description
Chat Rejections Today	Number of chats rejected on any given day.
Active Cases	Number of ongoing cases.
Cases Resolved Today	Number of resolved cases on any given day.

Reports for Amazon connect (Phone)

Report Name	Description
Active Calls	Number of ongoing calls between customers and agents.
Agents Available	Number of agents online.
Abandoned Calls	Number of calls that the agents were not able to attend on any given day.
Handled Calls Today	Number of calls attended by the agents on any given day.
Average Wait Time	Average amount of time in minutes that the customers needed to wait before talking to an agent.
Contacts in ACW State	Number of customer calls in which the agent must take some action after the call is over.
Oldest Contact Age	Call during which the customer had to wait the longest before speaking to an agent.
Average Abundant Time (seconds)	Average time before the customer disconnects the call after waiting for the agent to respond.
Average Handling Time Today	The average duration, from beginning to end, that a contact is engaged with an agent. This metric includes talk time, hold time, and the time spent on After Contact Work (ACW).
Average Wait Time Today	The average duration (seconds) that a contact remains in the queue before being attended to by an agent.
Max Queued Time Today	The longest time a contact waits in the queue. This includes all contacts added to the queue, even those that didn't connect with an agent.
Average Hold Time Today	The average duration (seconds) that a contact spends on hold while waiting in the queue.
Average Interaction Time Today	The average time (seconds) that contacts are actively engaged and interacting with agents. This does not include the time spent waiting in the queue.
Average Wrap Up Duration Today	The average duration (seconds) that agents spend in the After Contact Work (ACW) state, within the specified time range.

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Scheduled jobs

Scheduled job	Description
[Channel Management] Reset Temporary Capacity Override	Runs the job every two minutes check the invalid or expired overridden capacity and resets to the previous channel capacity.

Properties

Property	Description
sn_channel_mgmt.list_auto_refresh.enable	Select to disable auto-refresh of lists in Channel Management. • **Type**: True or False • **Default value**: True
sn_channel_mgmt.channels_card_auto_refresh.enable	Select to disable auto-refresh of lists in Channel Management. • **Type**: True or False • **Default value**: True
sn_channel_mgmt.list_auto_refresh.interval.seconds	Defines the auto-refresh interval for the channel management list. • **Type**: Integer • **Default value**: 30
sn_channel_mgmt.kpi_auto_refresh.interval.seconds	Sets the frequency for refreshing data on channel management indicators. • **Type**: Integer • **Default value**: 5
sn_channel_mgmt.channel_card_auto_refresh.interval.seconds	Defines the auto-refresh interval for the cards on channel management overview container. • **Type**: Integer • **Default value**: 120
sn_channel_mgmt.filter_config.enable	Displays **Assignment Group** interactive filter in channels. • **Type**: True or False • **Default value**: True
sn_channel_mgmt.awa_agent_temporary_override_duration	Duration for the channel capacity that is overridden.

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Properties (continued)

Property	Description
	• **Type**: Integer • **Default value**: 12 hours

Note: Channel management properties are not visible by default in the [sys_properties] table. To use any of the channel management properties, you must add the required property to the System Property [sys_properties] table. For more information, refer to Add a system property.

Scheduling

Roles

Role title [name]	Description	Contains roles
Shift Planning User [sn_shift_planning.user]	Grants read access for scheduling including the ability to view schedules and shifts.	None
Shift Planning Agent [sn_shift_planning.agent]	Grants agents access to their calendar and request shift swap or time-off.	sn_shift_planning.user
Shift Planning Admin [sn_shift_planning.admin]	Grants administrative access to create, read, update, and delete (CRUD) schedules and work shifts.	• sn_shift_planning.approver • sn_shift_planning.user • sn_shift_planning.agent

Tables

Table	Description
sn_shift_planning_time_worked_summary	Stores the time worked summary of an agent.
sn_shift_planning_agent_time_work	Stores the agent's time worked, such as clock-in and clock-out timings. If an agent logs in early or logs out late, then the shift start and shift end times are stored in place of clock-in and clock-out timings.
sn_shift_planning_agent_time_attendance	Stores the clock-in and clock-out timings of agents. Data is retrieved when an agent logs in, logs out or changes the presence state.

Properties

Property	Description
sn_shift_planning.number_of_days_to_cache	Number of days to cache agent schedules.

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Properties (continued)

Property	Description
	• **Type:** Integer • **Default value:** 5
sn_shift_planning.enable_schedule_adherence	Calculates and displays schedule adherence information for your agents. • **Type:** Boolean • **Default value:** True
sn_shift_planning.early_clockin_threshold	Threshold settings indicate how many minutes early or late an agent can clock-in or clock-out to the scheduled time without being considered non-adherent. This is the acceptable duration of time flexibility for an agent to start work before the scheduled start time. • **Type:** Integer • **Default value:** 60 min
sn_shift_planning.adherence_threshold	Set the percentage for a threshold in adherence. The agents who do not qualify to be above the defined threshold value (70%) are considered non-adherent agents. • **Type:** Integer • **Default value:** 70%
sn_shift_planning.conformance_lower_threshold	Set the lower threshold percentage for flexibility in conformance. The agents who don't qualify for the defined lower and upper conformance threshold values (80-120) are considered non-conformance agents. • **Type:** Integer • **Default value:** 80%
sn_shift_planning.conformance_upper_threshold	Set the upper threshold percentage for flexibility in conformance. The agents who do not qualify for the defined lower and upper conformance threshold values (80-120) are considered non-conformance agents. • **Type:** Integer • **Default value:** 120%
sn_shift_planning.auto_clockout_threshold	Threshold time for the system to wait and generate automatic clock-out events when agents forgets to clock-out. For example, if an agent's planned work

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Properties (continued)

Property	Description
	shift is 8 AM to 5 PM and fails to clock out at 5 PM, the system waits for 60 min as threshold time and generates an automatic clock-out event. • **Type:** Integer • **Default value:** 60 min
sn_shift_planning.display_shift_name	Set this property to true to display the shift name. If the value is false, event type will be displayed. • **Type:** Boolean • **Default value:** True **Note:** If you change the value of this property, the changes are effective after 24 hours. To view the changes immediately, run the *`Shift Planning - Delete All Agent Schedules Cache`* scheduled job.

Business rule

Business rule	Table	Description
Agent Time Work Event Trigger	Agent Presence [awa_agent_presence]	Sets the clock-in and clock-out events whenever there is a change in agent's presence state.

Scheduled Jobs

Name	Description
Shift Planning - Delete All Agent Schedules Cache	Deletes cache from the sn_shift_planning_agent_availability table. • Runs automatically everyday at 2:30 am • Run this job on-demand when you import data.
Clock-out event generation (For scenarios where clock-out event does not get triggered)	Generates clock-out events every 4 hours if agents haven't clocked-out.

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Scheduled Jobs (continued)

Name	Description
	Note: Consider an agent's work shift timings are from 8 AM to 5 PM and *sn_shift_planning.auto_clockout_threshold* property value is set to 60 minutes. The agent clocks-in and fails to clock out, the scheduled job waits until 6 PM(5 PM+60 minutes) and if there's no clock out until 6 PM, the system generates a clock-out event with agent's shift end time.
Populate Agent Time Worked Summary	Runs daily to calculate the time worked, adherence and conformance based on agent's planned and actual work shift timings of the previous day. The values are stored in [sn_shift_planning_time_worked_summary] table.
Update Wrapper End Time for Actual Work Events	Runs daily to make sure the actual work wrapper end-time is equal to last clock-out time.
[Schedule Adherence] Daily Data Collection	Runs the job daily and collects data for all teams indicators.
[Schedule Adherence] Historic Data Collection	Runs the job and collects historic data for all teams indicators.
[Schedule Adherence] Weekly Data Collection	Runs the job weekly and collects data for all indicators in Manager Workspace.

Setting the due date for time-off and shift-swap request approvals: Administrators can configure the due date logic for the Time Off Request and Shift Swap Request approval flows. The approval due date is set as the number of days before the request start date. The default is set to two days which means if the approval is not approved two days before the request start date, it will be auto-rejected. For information on configuring flows, refer to Build your first flow in Flow Designer.

Demand forecast

Forecast configurations

Name	Description
Cases Assigned	Collects data for cases.
Chat Interactions Created	Collects data for chat interactions.

The **WFO Forecast** time series metric retention policy is available by default for all forecast configurations. By default, this retention policy stores data at a 15min interval for the past three years for all zBoot customers.

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Resource conversion formula

Name	Formula to create this resource forecast configuration
Resources for Sales Support	`([FC:Chat Interactions Created] * [FP:Average Chat Work Time - Sales Support]`
Resources for Service Support	`([FC:Cases Assigned]*[FP:Average Case Work Time - Service Support]) + ([FC:Chat Interactions Created]*[FP:Average Chat Work Time -Service Support])`
Resources for Tech Support	`([FC:Cases Assigned]*[FP:Average Case Work Time - Tech support])+([FC:Chat Interactions Created]*[FP:Average Chat Work Time -Tech Support])`

Formula Parameters

Name	Description
Service Support: Average Case Work Time	Average time a service support agent worked on a case. Time is measured in hours. The default value is 0.5.
Service Support: Average Chat Work Time	Average chat duration a service support agent had for each interaction. Time is measured in hours. The default value is 0.25.
Tech Support: Average Case Work Time	Average time a tech support agent worked on a case. Time is measured in hours. The default value is 1.
Tech Support: Average Chat Work Time	Average chat duration a tech support agent had for each interaction. Time is measured in hours. The default value is 0.5.
Sales Support: Average Chat Work Time	Average chat duration a sales support agent had for each interaction. Time is measured in hours. The default value is 0.5.

If you create forecast parameters for a forecast configuration, the values set in the configuration are used instead of the default forecast parameters listed in the forecast properties section. For information on configuring forecast parameters, see Modify forecast parameters to visualize forecast data.

Forecast Properties

Name	Description
sn_agent_forecast.forecast_interval	The smallest interval (in minutes) at which historical data is collected and forecasts are generated. Valid values are 15 and 60.
sn_agent_forecast.number_of_historical_days_in_timeseries_chart	The number of historical days that will be plotted in time series

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Forecast Properties (continued)

Name	Description
	chart for 15-, 30-, and 60-minute intervals in Manager Workspace.
sn_agent_forecast.number_of_historical_days_in_daily_time_series_chart	The number of historical days that will be plotted in time series chart for daily interval in Manager Workspace.

Roles for demand forecast

Role title [name]	Description	Contains roles
Forecast admin [sn_agent_forecast.admin]	Grants administrative rights to create, read, update, and delete (CRUD) forecast configuration tables.	• sn_agent_forecast.users • clotho_admin
Forecast user [sn_agent_forecast.user]	Grants read access to forecast configuration tables.	

Tables for demand forecast

Table	Description
Forecast Configuration [sn_agent_forecast_configuration]	Define data collection definition and resource conversion formula configurations.
Forecast Parameter [sn_agent_forecast_parameter]	Define forecast parameters required for the formula.
Forecast Configuration group [sn_agent_forecast_configuration_m2m_sys_user_group]	Associate resource conversion formula with assignment groups.

By default, forecast configurations are available for the following groups:

- Sales Support
- Service Support
- Tech Support

Schedule jobs for demand forecast

Name	Description
Collect daily data for demand forecast data collection definitions	Runs daily at 2 am. For any table defined in the Data Collection Definition configuration, it counts the number of records from the previous day at 15-minute interval for every group and stores it in the MetricBase. Data collected at 15-minute interval is also aggregated at daily interval and stored in the MetricBase.
Forecast resources for future	Runs daily at 3 am. Calculates the forecast resources for the future based on the collected data and stores the data in the Agent Forecast metric in MetricBase.

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Schedule jobs for demand forecast (continued)

Name	Description
Create cases and chats for previous day	Daily job that creates demo cases and chats for previous day.
Delete case demo data	Deletes cases older than 90 days. Not enabled by default.
Delete interaction demo data	Deletes chats older than 90 days. Not enabled by default.

On demand jobs for demand forecast

Collect historical data for demand forecast data collection definitions	Runs on demand. Collects historical data daily for 15-minute interval and aggregates the data at daily interval for 1098 days (past three years) and stores it in the MetricBase. Once the job is executed, the **Daily Historical data duration** column displays the number of days for which historical data has been collected for daily interval. The **Duration** column displays the number of days for which historical data has been collected for 15-minute interval. Both the columns are associated with the Forecast Configuration [sn_agent_forecast_configuration] table.
Generate forecasting demo data	Runs on demand. Collects data for data collection definitions for past 90 days. Runs Forecast resources for future jobs to generate volume forecasts and staffing plan for next 30 days. Activates Create cases and chats for previous day job to create cases and chats.

Teams

Roles

Role title [name]	Description	Contains roles
Teams User [sn_team_perf.team_performance_user]	Grants access to read KPI values.	• sn_wfo.user • pa_analyst
Teams Admin [sn_team_perf.team_performance_admin]	Grants access to create and configure KPIs, KPI groups, and assignment groups in the Teams module.	• sn_wfo.admin • sn_team_perf.team_performance_user

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Properties

Property	Description
sn_team_perf.kpi_group.max_parent_kpis	The maximum number of parent indicators that you can add to one KPI group. • **Type:**Integer • **Default value:**5
sn_team_perf.kpi_group.max_supporting_kpis	The maximum number of supporting KPIs you can define for a parent KPI. • **Type:**Integer • **Default value:**10
sn_team_perf.ws.max_assignment_groups	The maximum number of assignment groups prioritized by order number to display on the Teams application in Manager Workspace. • **Type:**Integer • **Default value:**15
sn_team_perf.default_date_range	The default date range set in the date range picker. • **Type:**Integer • **Default value:**30

Performance analytics indicators

Indicator Name	Description
# of cases resolved on first contact	Number of cases resolved on first contact.
# of P1 cases resolved on first contact	Number of P1 cases resolved on first contact.
# of P2 cases resolved on first contact	Number of P2 cases resolved on first contact.
# of P3 cases resolved on first contact	Number of P3 cases resolved on first contact.
# of P4 cases resolved on first contact	Number of P4 cases resolved on first contact.
MTTR for Cases	Mean time to resolve the cases.
MTTR for P1 Cases	Mean time to resolve the P1 cases.
MTTR for P2 Cases	Mean time to resolve P2 cases.
MTTR for P3 Cases	Mean time to resolve the P3 cases.
MTTR for P4 Cases	Mean time to resolve P4 cases.
CSAT for Cases	Customer satisfaction score for cases.
CSAT for P1 Cases	Customer satisfaction score for P1 cases.
CSAT for P2 Cases	Customer satisfaction score for P2 cases.
CSAT for P3 Cases	Customer satisfaction score for P3 cases.

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Performance analytics indicators (continued)

Indicator Name	Description
CSAT for P4 Cases	Customer satisfaction score for P4 cases.
Number of Closed Cases	Number of closed cases.
Number of Closed P1 Cases	Number of closed P1 cases.
Number of Closed P2 Cases	Number of closed P2 cases.
Number of Closed P3 Cases	Number of closed P3 cases.
Number of Closed P4 Cases	Number of closed P4 cases;
Average Wait Time for Chats	Average waiting time for chats.
Number of Chats Handled	Number of chats handled.
Average Handling Time for Chats	Average handling time for chats.
Number of Abandoned Chats	Number of abandoned chats.
Number of Incoming Cases	Number of incoming cases.
Schedule Adherence	Agents schedule adherence percentage.
Schedule Conformance	Agents schedule adherence percentage.
Summed duration of Time Worked	Agents total duration of time worked.
Summed Duration of Planned Time	Agents total duration of planned time.
Summed duration of Time Not Worked	Agents total duration of time not worked.
Summed duration of Available Non Planned Time	Agents total duration of available non planned time.

Coaching

Roles

Role title [name]	Description	Contains roles
Coaching Admin [sn_coaching.admin]	Grants administrative rights to create, read, update, and delete (CRUD) coaching opportunities, assessments, training, and skills.	• sn_coaching.coach • sn_lc.learning_admin
Coaching Coach [sn_coaching.coach]	Grants administrative rights to create, read, or update coaching opportunities, assessments, training, and skills.	• sn_coaching.trainee • pa_viewer • sn_lc.catalog_manager
Coaching Trainee [sn_coaching.trainee]	Grants access to add training, assessments, and skill records.	• skill_user • pa_viewer • survey_reader

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Important: This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Business rule

Business rule	Table	Description
Calculate coaching survey score	Assessment Instance [asmt_assessement_instance]	Sets the feedback rating based on the survey score.

Coaching opportunities

Coaching Opportunity Name	Description	Table
Coaching Opportunity for SLA Breach	Coaching opportunity for the agents who worked on the critical and high priority cases that breached SLA.	Task SLA [task_sla]
Coaching Opportunity for low CSAT	Coaching Opportunity for the agents who worked on cases that has a customer satisfaction score less than 4.	Case Report [sn_customerservice_case_report]
Coaching Opportunity for skills award verification	Coaching Opportunity for verification of skills awarded to agents.	Case [sn_customerservice_case]
Knowledge Management Process: Coaching on quality of knowledge articles	Coaching Opportunity for the agents who need to improve the quality of a knowledge article by reviewing the assessment.	Case [sn_customerservice_case]
Coaching Opportunity for high TTR	Coaching Opportunity for the agents who worked on a case that had time to resolution more than 3 days.	Case Report [sn_customerservice_case_report]
Interaction: Coaching Opportunity for Handling Time	Coaching Opportunity for the agents who worked had handle time more than 10 mins on an interaction.	Interaction [interaction]

Note: You can customize the coaching opportunities for low CSAT, high TTR, SLA breach, and handling time based on your business needs.

Important: This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

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Coaching surveys

Name	Description
Chat Quality Survey	Survey associated with the Chat Interaction coaching opportunity. The coach assess the agent using this survey after the agent completes a chat interaction.
Case Quality Survey	Survey associated with the Case Interaction coaching opportunity. The coach assess the agent using this survey after the agent completes a case interaction.

Properties

Property	Description
sn_coaching.learning_default_duration	Number of days to read the knowledge article or complete training. The admin (sn_wfo.admin) sets the number of days for the trainee to complete reading the article or complete the training. The number of days is converted to the due date for the trainee to complete the training. It is calculated from the current date taking the trainee's time zone into consideration. • **Type:**Integer • **Default value:**5
sn_coaching.exclude_weekends_on_training_due_date	Excludes weekends when the due date is set for trainees to complete training. • **Type:**true | false • **Default value:**true

Coaching with learning

Important: This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Roles

Role title [name]	Description	Contains Roles
Learning admin [sn_lc.learning_admin]	Grants administrative rights to create, read, update, and delete (CRUD) catalog, learning content, roles, and configure learning source.	• sn_lc.catalog_manager • sn_hr.integr_fw.admin
Learning catalog manager [sn_lc.catalog_manager]	Grants administrative rights to create, read, or update learning catalogs.	• sn_lc.task_creator • sn_lc.content_writer

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Roles (continued)

Role title [name]	Description	Contains Roles
Learning catalog group manager [sn_lc.catalog_group_manager]	Grants administrative rights to create, read, or update learning catalogs based on groups.	• sn_lc.task_creator • sn_lc.content_writer
Learning content creator [sn_lc.content_creator]	Grants administrative rights to create, read, or update internal courses.	sn_lc.content_reader
Learning content writer [sn_lc.content_writer]	Grants read or write access for learning courses.	sn_lc.content_creator
Learning content reader [sn_lc.content_reader]	Grants read access for learning courses.	
Learning content advisor [sn_lc.learning_advisor]	Can assign learning tasks.	
Learning task creator [sn_lc.task_creator]	Grants read or write access for learning tasks.	

Tables

Table	Description
Learning External Content [sn_lc_external_content]	Stores details of external course items that are pulled from third-party systems.
Learning User Course Activity [sn_lc_user_course_activity]	Stores details of learning course activities such as user to whom the course is assigned, status, due date, and name of the learning course.
Learning Content [sn_lc_content]	Stores details of internal learning content such as knowledge articles, videos that are created in ServiceNow.
Learning Course Item [sn_lc_course_item]	Stores details of learning course items, such as the source to which the learning course belongs.
Learning Catalog [sn_lc_catalog]	Stores details of learning catalog items with its course items.
Learning Task [sn_lc_learning_task]	Stores details of learning tasks, such as user to whom the learning task assigned, and due date by when the learning task must be completed.
Learning System Configuration [sn_lc_learning_system_configuration]	Stores configuration parameters of sources (third-party learning management systems).

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Properties

Property	Description
glide.ui.sn_coaching_assessment_activity_fields	Edits coaching assessment activities. • **Type:** string • **Default value:** assigned_to,cmdb_ci,state,impact,priority,opened_by,work_notes,comments,*Attachme
sn_coaching.recommended_learning_deprecated	Coaching with Learning deprecated Trainings is being deprecated and replaced with the Learning Tasks and course items from Coaching with Learning. • **Type:** string • **Default value:** true
sn_coach.lrn.exclude_weekends_property	Enable this property to exclude weekends while setting the due date for learning tasks. • **Type:** true|false • **Default value:** true
sn_coach_lrn.learning_list_array_properties	Data array properties for the now-list-menu component on the Learning Tasks tab, coaching module. • **Type:** string • **Default value:** script for data array
com.glide.transform.json.max-partial-length	Transforms JSON objects to internal objects and sets the word limit for records fetched through an API call. • **Type:** integer • **Default value:** 16384 **Note:** You must Add this system property to set the desired value. When you synchronize third-party learning content with your ServiceNow instance, if the word count of the content being pulled into your instance exceeds the value set for this property, the synchronization fails.
com.snc.process_flow.serialized_vars_size_limit	Specify the allowed value sizes allowed for runtime values in each step in the flow execution details. To prevent truncation, set the value to an integer equal to or less than zero. • **Type:** integer • **Default value:** 16384

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Properties (continued)

Property	Description
	Note: When you synchronize third-party learning content with your ServiceNow instance, if the word count of the content being pulled into your instance exceeds the value set for this property, the synchronization fails.

Important: This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Skill recommendation

Roles

Role title [name]	Description	Contains roles
Skill Recommendation User [sn_sre.user]	Grants rights to view skill recommendation tables.	wfo.user
Skill Recommendation Admin [sn_sre.admin]	Grants administrative rights to edit the properties for skill recommendation.	• wfo.admin • sn_sre.user

Navigate to **Skill Recommendation** > **Configuration** to configure these properties.

Properties

Property	Description
Enable skill recommendation. sn_sre.enable_skill_recommendation	Enable this property to start recommending skills for agents. • **Type:**true | false • **Default value:**true
Maximum number of skills to predict based on supervised learning. sn_sre.max_supervised_skills	Using supervised learning, the maximum number of skills to predict for each incident ordered by confidence of prediction. • **Type:**Integer • **Default value:**3
Maximum number of skills to predict based on supervised learning. sn_sre.max_unsupervised_skills	Using unsupervised learning, the maximum number of skills to predict for each incident ordered by confidence of prediction. • **Type:**Integer • **Default value:**3

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Properties (continued)

Property	Description
Number of times Predictive Intelligence must predict the same skill for an agent before recommending it for the agent. sn_sre.user_predicted_skill_threshold	The number of times Predictive Intelligence must predict the same skill for an agent before recommending the skill for the agent. • **Type:**Integer • **Default value:**20
Similarity solution definition to recommend skills from similar cases. sn_customerservice.unsupervised_solution_definition_for_cases	Name of the Predictive Intelligence solution definition used for predicting skills to resolve cases using unsupervised learning. If you have created your own solution definition, you can replace the default one with the one you have created. • **Type:**String • **Default value:**ml_sn_sn_customerservice_global_recommend_similar_
Similarity solution definition to recommend skills for cases. sn_customerservice.supervised_solution_definition_for_cases	Name of the Predictive Intelligence solution definition used for predicting skills to resolve cases using supervised learning. If you have created your own solution definition, you can replace the default one with the one you have created. • **Type:**String • **Default value:**ml_sn_sn_customerservice_global_recommend_skills_fr

Scheduled job

Scheduled job	Description
Start skill prediction	Runs the job every day at 1 AM on all incidents that were closed the previous day. Recommends the skills used to close the incidents to resolve similar open incidents.

Tables

Table	Description
User Predicted Skill [sn_sre_user_predicted_skill]	• Stores how many times a skill has been predicted for the user. • Skills not recommended in the last 60 days are automatically deleted from this table.

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Tables (continued)

Table	Description
Task Predicted Skill [sn_sre_task_predicted_skill]	• Stores the skills predicted to resolve each type of incident. • Records created over 60 days ago are automatically deleted from this table.

Decouple Channel Management dependencies from WFO

Decouple Channel Management from core Workforce Optimization (WFO) modules to support modular deployment, enabling independent updates or scaling of Channel Management without impacting other workforce engagement.

Overview of decoupling channel management

Channel Management is a crucial tool that allows users to monitor ongoing work and track agents' performance. Decoupling Channel Management from the core Workforce Optimization (WFO) modules supports modular deployment, enabling independent updates or scaling of Channel Management without impacting other workforce engagement.

Note: Channel Management when installed as a standalone module along with the agent workspace, the other modules are disabled.

Key Benefits:

- Independent Deployment: Channel Management can now be deployed independently, allowing for greater flexibility and control.
- Reduced Inter-Module Dependencies: The decoupling reduces dependencies between modules, enhancing system stability.
- Enhanced Scalability and Maintainability: The new architecture improves scalability and maintainability, making it easier to manage and expand.
- Streamlined Future Upgrades: Future upgrades for individual modules can be streamlined, ensuring smoother and more efficient updates.

Roles and Responsibilities

Roles and Responsibilities

Role Name	Description
sn_channel_mgmt.admin (for group manager)	The System Administrator creates a customer care assignment group and manage channel configurations and assignments.
sn_channel_mgmt.user (for the additional manager)	The Manager can log into Agent Workspace and access the channel management module through role-based visibility, such as the sn_channel_mgmt.user role. The Manager can utilize Channel Management in Agent Workspace independently of the full WFO suite.

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Roles and Responsibilities (continued)

Role Name	Description
	For more details see Configuring groups in Workforce Optimization for ITSM

Channel Management (New Menu in Agent Workspace)

Role: canvas_user and sn_channel_mgmt.user.

Agent Workspace is updated with a new menu icon ChannelManagement. Admin or user can see and access channel icon on the left pane for channel management in the Agent Workspace. On selecting the new channel menu icon, you can view the service channels. Admins can allocate the work items under Queued Work table, to respective group members.

Channel Management Capabilities for Supervisor Persona

Role: sn_csm.manager.

Enabling the channel management capabilities for the supervisor persona in Agent Workspace allows access to channel management without the need for the full WFO suite. The Manager can log into Agent Workspace and access the channel management module through role-based visibility, such as the sn_channel_mgmt.user role. This ensures that the Manager can use Channel Management in Agent Workspace independently of the full WFO suite.

Demo Data for Channel Management in Agent Workspace

Role: sn_channel_mgmt.admin.

Setting up demo data in Agent Workspace to showcase Channel Management features. The personas involved are an Agent and a Supervisor. The Supervisor creates a customer care assignment group and manage channel configurations and assignments. This group is associated with the customer care chats queue to manage inbound communication effectively. The demo data is provided within Agent Workspace, allowing users to view and interact with it to explore Channel Management functionalities. The validation process includes checking the addition of the new customer care group, populating group members, assigning roles, and ensuring all sections function properly.

For more information on channel management for customer service in workforce optimization, see: Channel Management in Workforce Optimization for Customer Service

Work Scheduler components in Workforce Optimization for Customer Service reference

Workforce Optimization for ITSM has properties to configure the Work scheduler default behavior.

Properties

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Enter *sys_properties.list* in the Workspace filter navigator and search for the work scheduler properties listed below.

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Properties

Property	Description
sn_wfo_work_sched.csm_allowed_tables	Defines the list of tables that a Work scheduler admin (sn_wfo_work_sched.admin) can use to create configurations for work assignments in the Workforce Optimization for Customer Service manager workspace. • **Type**: string • **Default value**: sn_customerservice_case
sn_wfo_work_sched.shift_data_categories	Comma separated sys ids for event categories that display in the Work scheduler calendar in the manager workspace. **Type**: string
sn_wfo_work_sched.should_fetch_shift_data	Enables the display of shift spans in Work scheduler in Workforce Optimization for Customer Service manager workspace. • **Type**: true|false • **Default value**: true
sn_wfo_work_sched.recommend_criteria_limit	Defines how many matching criteria can be created for each matching rule in Work scheduler when suggestions are enabled. • **Type**: integer • **Default value**: 10
sn_wfo_work_sched.match_criteria_threshold	Defines which users are shown in Work scheduler when suggestions are enabled and the matching criteria percentage is greater than the value indicated. • **Type**: integer • **Default value**: 0

Domain separation in Workforce Optimization for Customer Service

Domain separation is supported in Workforce Optimization for Customer Service. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data. Domain separation in Workforce Optimization for Customer Service is configured to apply to all features of the application. Separation of data is configured along with separation of logic and process.

Support level: Basic

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- 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.

How domain separation works in Workforce Optimization for Customer Service

Domain separation in Workforce Optimization for Customer Service does not require any setup or configuration.

Domain separation for Channel Management in Workforce Optimization for Customer Service

The work items, such as cases, interactions, and their associated actions, appear based on the selected domain. For information on how work assignments are routed based on domain in Channel Management, refer to Domain separation and Advanced Work Assignment

The domain-separated tables for Channel Management are as follows:

- Service Channel Reports [m2m_awa_service_channel_report]
- Queue Reports [m2m_awa_queue_report]

Domain separation for Scheduling in Workforce Optimization for Customer Service

When an agent schedule is generated and assigned to an agent, the schedule is only available in the domain that agent belongs to.

The domain-separated tables for Scheduling are as follows:

- sn_shift_planning_agent_schedule
- sn_shift_planning_agent_schedule_request
- sn_shift_planning_break
- sn_shift_planning_day
- sn_shift_planning_event
- sn_shift_planning_schedule_plan
- sn_shift_planning_schedule_shift
- sn_shift_planning_schedule_shift_agent
- sn_shift_planning_shift_plan
- sn_shift_planning_shift_swap_request

Domain separation for Teams in Workforce Optimization for Customer Service

The *sn_wfo_add_manager* table is domain separated. When users are added as additional managers, those users can only view users within that domain.

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Domain separation for Skill Recommendation in Workforce Optimization for Customer Service

Domain separated tables for Skill Recommendation

- sn_sre_task_predicted_skill
- sn_sre_user_predicted_skill

Domain separation for Coaching in Workforce Optimization for Customer Service

For information on how domain separation works in Coaching for Workforce Optimization for ITSM, refer to Domain separation and Coaching.

Related topics

Domain separation for service providers

Create Manager Workspace landing page

Create a landing page based on your business requirement.

Before you begin

Create reports and key performance indicators that are required to set up the landing page.

Role required: sn_mgr_workspace.admin

About this task

The landing page displays a set of reports that are the initial view of your workspace. You can enhance the Workforce Optimization experience by customizing the landing page to monitor metrics and trends that matter most to you. Use the User Interface (UI) Builder to add data visualization components to display widgets and reports that you want to track and monitor.

Using UI Builder, you can:

- Clone the existing CSM landing page.

  Note: The application scope can be set to CSM Workspace, CSM Manager Workspace or Workforce Optimization. The **Clone Page** action is not available in the Global scope.

- Add or edit containers in the page.
- Add or edit visualizations for each container.
- Edit the layout of a page or container.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Administration** > **Landing Pages**.
2. Click the **CSM Landing Page**.
3. Click **Clone Page**.

   Note: The **Clone Page** action is available when the application scope is CSM workspace.

4. Fill out the form.

   The settings in the **Layout** and **Available Child Slots** fields determine how the content renders on the page.

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Landing page attributes and layout

Field	Description
Name	The name of your landing page.
Component	The component defaults to sn-page and is read-only.
Order	The order for the landing page. If you have multiple landing pages, the order determines the landing page precedence. Pages with a lower-order value take precedence over pages with a higher-order value.
Active	Determines whether the landing page is active. Enable for a landing page to be displayed.
Optional Page Title	A title to display on the page.
Available Child Slots	A predefined style of child slots.
Layout	The layout of the columns on the page.

5. Click **Update** to save your landing page.
6. **Optional:** Configure permissions for users to access the landing page.
   a. Click the **UX Page Element Permissions** related list.
   b. Click **New**.
   c. Select the role or group for the landing page to be visible.
   d. Click **Submit** to save your permissions.
   Any page element (including sub elements) can have a restriction to a given set of roles or groups. If there are no element permissions set on roles or groups, then all users see the element. If there are some element permissions set, then a user needs just one role or group assignment to see the element.
7. Configure a container:
   a. Click the **UX Page Elements** related list.
   b. Click **New Container** or select an existing container.
   c. Fill out the form.

Container attributes and layout

Field	Description
Name	The name of your container.
Component	The component defaults to sn-page-container and is read-only.
Parent element	The landing page your container resides.
Slot	The component placement within the parent element's slot configuration.
Order	The order the page shows.

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Field	Description
Border	Enable if you want a border around your container.
Optional Container Title	A title to display on the container.
Type	Select a type of styling for your visualization.
Available Child Slots	A predefined style of child slots.
Layout	The layout of the columns on the page.

8. Configure a widget:
   a. Click **New Visualization** or select an existing widget.
   b. Fill out the form.

Widget attributes and layout

Field	Description
Name	The name of your widget.
Component	The component defaults to sn-page-widget-visualization and is read-only.
Parent element	The container that your widget resides in.
Slot	The component placement within the parent element's slot configuration.
Order	The order the component shows.
Report	Select the report you want to render: ○ Single score ○ Trend by ○ List **Note:** Choose and populate either **Report** or **PA Widget**, but you cannot display both.
PA Widget	Select the PA widget you want to render: ○ Single score ○ Time series **Note:** Choose and populate either **Report** or **PA Widget**, but you cannot display both.
Optional Widget Label	A label to display on the widget.
Size Variant	Select the size of the widget. Choices include: ○ Small ○ Medium

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Field	Description
	○ Large ○ Extra Large **Note:** Not all size variants apply to all widgets.
Border	Check if you want a border around your widget.
Refresh Interval	Determines the number of minutes before a widget refreshes with new data. The interval begins when a user navigates away from a landing page, and ends when the user comes back to the landing page. **Note:** There is no auto-refresh, but a user can click a refresh button at any time.
Additional Details	Any additional information to note about the widget.
Visualization SysID [Read Only]	Designated ID for the widget.
Report Type [Read Only]	The type of report that renders.

9. Click **Update** or **Submit** to save changes to the page element.
10. Click **Update** to save changes to the landing page.

Set the default landing page

You can set a default landing page to surface the information that is most relevant for your business.

Before you begin

Role required: sn_mgr_workspace.admin

Procedure

1. Navigate to **All** > **Workspace Experience** > **Administration** > **All Workspaces**.
2. Click **Manager Workspace**.
3. Drag and drop the PA indicators or containers.
4. Set the refresh rate interval for the reports or indicators.
5. In the Landing Pages related list, set the value of the **Order** field of the landing page that you want to set as the default to minimum.

   Note: The landing page with the minimum order value is considered to be the default landing page.

6. **Optional:** Verify the default landing page assignment by navigating to **Workspace Experience** > **Administration** > **Landing Pages**
   Ensure the landing page that you want to set default has the minimum **Order** value.

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Set the enhanced Manager Workspace landing page

Set the enhanced Manager Workspace as the default landing page for an improved user experience.

Before you begin

Role required: sn_wfo_cfg_ws.manager

Procedure

1. Navigate to **All** > **UI Builder** > **Experiences**.
2. In the search field, enter `Manager Workspace`.
3. Select **Manager Workspace**.
4. On the Manager Workspace page, in the Landing Page section, select **Settings** for the Manager Dashboard.
   The Settings page appears for the Manager Dashboard.
5. On the Settings page, in the **Availability** field, select the **Active** check box.

   Note: If a message appears about the application scope, select **Edit in original scope** to be able to edit the record.

6. In the **Order** field, enter the minimum value of the landing page.

   Note: Verify the landing page that you want to set default has the minimum Order value.

7. Select **Save**.

Result

You can access the enhanced Manager Workspace as the default landing page.

Manager Workspace properties

Modify the Manager Workspace configuration by customizing the system properties to set the Alerts card limit and the widget refresh interval.

Navigate to**All>System Properties>All Properties**.

Alternatively, in your instance, enter `sys_properties.list` in the filter navigator and view the system properties.

Workspace system properties

Property	Description
sn_csm_wfo_workspa.alerts_cards_limit	Enable or disable interaction creation for a non-matched user. • Type: Integer • Value: 15 • Location: **All> System Properties> All Properties**.

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Workspace system properties (continued)

Property	Description
sn_csm_wfo_workspa.widget_refresh_interval_long	Set the inactivity period (in days) after which an interaction is closed if no email is received from the customer. • Type: Integer • Value: 120 • Location: **All> System Properties> All Properties**.
sn_csm_wfo_workspa.widget_refresh_interval_short	Set the inactivity period (in days) after which an interaction is closed if no email is received from the customer. • Type: Integer • Value: 30 • Location: **All> System Properties> All Properties**.

Configure filters for Manager Workspace

Configure filters for scheduling and coaching applications and use the default filter for channel management to refine your search results.

Before you begin

Role required: sn_csm_wfo_workspa.admin

About this task

View and analyze data in scheduling and coaching applications based on the filters configured. You can only use the default filters for channel management and cannot configure new filters.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Manager Workspace Configuration** > **Filter Configurations**.
2. Click **New**.
3. On the form, fill in the fields.

Filter Configuration form

Name	Description
Filter Name	Unique name for the filter configuration.

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Name	Description
Table	Table for which the filter is configured. **Note:** You can filter only on specific tables or database views for each module. Refer to Filter Configuration Tables in Manager Workspace for a list of tables and database views you can use for each application.
Field	Field on which to filter.
Filter Query	Query to narrow down the filter options.
Type	○ **Choice:** choice type field. ○ **Reference:** reference type field.
Order	Filter display order in Manager Workspace.
Workspace Module	Workforce Optimization for Customer Service module that displays the filter configuration.
Active	Enables the filter configuration in Manager Workspace.
Macroponent	Metadata defined seismic component.

4. Click **Submit**.

Setting up service channels and queues

You can set up service channels, queues, and key performance indicators (KPIs) to route work items automatically to agents based on an agent's availability, capacity, and skills.

With Workforce Optimization for Customer Service, you, as a channel administrator, can set up service channels and work item queues so that managers can view the real-time operational metrics for the work that is being done by their teams and the specific items that their teams are working on. You can also configure real-time refresh intervals for the metrics and lists so that managers can always see the latest information about their teams.

Configure filters to refine the search and view targeted results. Filters are persisted across all channel management pages in the session. To view a list of the default interactive filters and the KPI reports for channels, queues, agents, and groups that you can map to the interactive filters, see Interactive Filters under the Channel Management section. By default, the assignment group filter is applied to all lists and groups that you manage. You can disable interactive filters by using the `sn_channel_mgmt.filter_config.enable` property.

Add service channels and queues

Add service channels and queues to automatically route incoming work items to agents.

Before you begin

Role required: sn_channel_mgmt.admin

About this task

A service channel is a means of assigning a specific type of work items to agents. You can modify the existing service channels or create your own custom service channel.

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Procedure

1. To create a service channel, do the following:
   a. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
   b. Click **New** and see Create a service channel to create the service channel.
   c. Click **Submit**.
   The service channel is created.
2. To create a queue, do the following:
   a. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Queues** or select the service channel and click the **Queues** tab.
   b. Click **New** and see Create a work item queue to create the queue.
   The queue is created in the service channel.

Create assignment rules and groups

Define agent assignment rules and specify groups of agents who are eligible to receive overflow work assignments for a queue.

Before you begin

You must first create a new assignment rule before you create a service channel. For more information, see create a service channel. Use Advanced Work Assignment (AWA) to route work items automatically to agents based on an agent's availability, capacity, and skills.

Role required: sn_channel_mgmt.admin

About this task

An eligible assignment group can consist of one or more groups of agents available to work on items in the queue.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Queues**.
2. Click the queue to which you want to define an assignment rule.
3. In the **Assignment Eligibility** tab, click **New**.
4. On the form, fill in the fields.

Assignment Eligibility form

Field	Definition
Agent assignment rule	Name of the rule that determines how work items are to be assigned. Select an assignment rule from the list.
Eligible at	Length of time in seconds before AWA considers the next set of agents for assignment.
Groups	Groups that are eligible for assignment.

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Field	Definition
	○ Click the lock ( ) icon to unlock it and select the agent groups in the eligible assignment pool. ○ Click the ( ) icon to lock it.

5. Click **Submit** to create the eligible or **Update** if modifying an eligible assignment pool.
   The Queues [awa_queues] table is updated with the eligible assignment group.

   Note: For a new service channel, you must first create a new assignment rule and then create a service channel.

Configure KPIs for service channels

Configure key performance indicators (KPIs) in service channels to your teams to track the ongoing work and real-time performance of teams.

Before you begin

Role required: sn_channel_mgmt.admin

About this task

Add the channel Management reports that are by default configured with Workforce Optimization for Customer Service or create a new KPI report that matters the most to you. Key performance indicators help managers perform the following actions:

- Review real-time performance as the team is actively working on tasks across channels and queues.
- Track progress against KPIs and drill down into agents, team, and individual performance.
- Drill down into all queues and monitor ongoing cases, interactions, and tasks.
- Jump in and support agents for help-requested work items using chat whisper or add work notes to a task.
- Refine data in the dashboard using the Assignment Group interactive filter without modifying the reports. For more information, see Interactive Filters.

The KPI scores are automatically refreshed at an interval of five seconds. However, you can modify the refresh interval by adding the `sn_channel_mgmt.kpi_auto_refresh.interval.seconds` property or choose to not automatically refresh using the `sn_channel_mgmt.channels_card_auto_refresh.enable` property. Also, the service channel cards refreshes automatically in 2 minutes as configured in the `sn_channel_mgmt.channel_card_auto_refresh.interval.seconds` system property or you can manually refresh by clicking the Refresh ( ) icon.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
2. Click the service channel to which you want to add KPIs.
3. In the **Reports** tab, click **Edit**.

   Note: You must add the Reports related list if you do not see the **Reports** tab.

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4. Select and add the Channel Management reports that are by default configured with Workforce Optimization for Customer Service.

   Note: Review the report's definition and add the corresponding filters that are applicable to the service channel that matters the most to you.

5. Click **Save**.
6. **Optional:** To create a KPI report that is explicitly applicable to your teams, do the following:

   a. Navigate to **Reports** > **Create New**.

   b. Fill in the details.
   For more information, see Create a single score report.

   c. Click **Save**.
   The KPI report is created.

   d. Navigate to **Reports** > **Administration** > **Interactive Filters**.

   e. Click **Channel Management Groups Filter**.

   f. Select the Interactive filter references related list and click **New**.
   The Interactive Filter Reference - Channel Management Groups Filter page appears.

   g. Select the KPI report's table name and field name.
   For more information, see Create a reference field interactive filter.

   h. Click **Submit**.

   i. Repeat steps 1 to 4 for each KPI report to be added in the service channel.

   - KPI reports are added with an **Order** being shown as 100, 200 and so on. You can also change the order of a KPI report during selection.
   - By default, the report name is considered as the **Name**. However, you can change the display name per your business needs.

Result

The KPIs are added to the service channel and appear in the Channels page. The first five KPIs with the lowest order number appear in the service channel cards.

Configure KPIs for queues

Configure key performance indicators (KPIs) for queues so that you can track the incoming work by category in a service channel.

Before you begin

Role required: sn_channel_mgmt.admin

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Procedure

1. To add KPIs to a queue, do one of the following.

To	Do This
Add from a service channel	**a.** Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channel**. **b.** Select a service channel. **c.** Click the **Queue** tab. **d.** Select a queue.
Add from a queue	**a.** Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Queues**. **b.** Select a queue.

2. In the **Reports** tab, click **Edit**.

   Note: You must add the Reports related list if you do not see the **Reports** tab.

3. Add the Channel Management reports that are by default configured with Workforce Optimization for Customer Service.

   Note: Review the report's definition and add the corresponding filters applicable to the service channel that matter the most to you.

4. Click **Save**.
5. **Optional:** To create a KPI report that is explicitly applicable to your teams, do the following:

   a. Navigate to **Reports** > **Create New**.

   b. Fill in the details.
   For more information, see Create a single score report.

   c. Click **Save**.
   The KPI report is created.

   d. Navigate to **Reports** > **Administration** > **Interactive Filters**.

   e. Click **Channel Management Queues Filter**.

   f. Select the Interactive filter references related list and click **New**.
   The Interactive Filter Reference - Channel Management Queues Filter page appears.

   g. Select the KPI report's table name and field name.
   For more information, see Create a reference field interactive filter.

   h. Click **Submit**.

   i. Repeat steps 1 to 4 for each KPI report to be added in the queue.

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Result

The key performance indicators are added to the queue and appear in the **All Queues** tab in the Channels page. By default, the KPI scores are automatically refreshed at an interval of five seconds. However, you can modify the refresh interval by adding the sn_channel_mgmt.kpi_auto_refresh.interval.seconds property.

Configure KPIs for agents

Configure key performance indicators (KPIs) in service channels for your agents so that you can track the agents' ongoing work and real-time performance.

Before you begin

Role required: sn_channel_mgmt.admin

About this task

Add key performance indicators to channels to help managers perform the following actions:

- Review real-time performance of agents who are actively working on tasks across channels and queues.
- Track progress against KPIs and drill down into agents and individual performance.

The KPI scores are automatically refreshed at an interval of 30 seconds. However, you can modify the refresh interval by adding the *sn_channel_mgmt.kpi_auto_refresh.interval.seconds* property. Also, the service channel cards refreshes automatically in 2 minutes as configured in the *sn_channel_mgmt.channel_card_auto_refresh.interval.seconds* system property or you can manually refresh by clicking the Refresh ( ) icon.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
2. Click the service channel that you want to add KPIs to.
3. Click the Agents Reports related list.
4. Add the Reports for Agents in Channel Management that are by default configured with Workforce Optimization for Customer Service.

   Note: Review the report's definition and add the corresponding filters that are applicable to the service channel that matters the most to you.

5. Click **Save**.
6. **Optional:** To create a KPI report that is explicitly applicable to your teams, do the following:

   a. Navigate to **Reports** > **Create New**.

   b. Fill in the details.
   For more information, see Create a single score report .

   c. Click **Save**.
   The KPI report is created.

   d. Navigate to **Reports** > **Administration** > **Interactive Filters**.

   e. Click **Channel Management Agent Filter**.

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f. Select the Interactive filter references related list and click **New**.
The Interactive Filter Reference - Channel Management Agent Filter page appears.

g. Select the KPI report's table name and field name.
For more information, see Create a reference field interactive filter.

h. Click **Submit**.

i. Repeat steps 1 to 4 for each KPI report to be added in the service channel.

- KPI reports are added with an **Order** being shown as 100, 200, and so on. You can also change the order of a KPI report during selection.
- By default, the report name is considered as the **Name**. However, you can change the display name per the business needs.

Result

The KPIs that are configured in the service channel appear in the Current Work section of the agent's Overview page. For more information, see Track and analyze agents' performance.

Configure supervisor lists for service channels

Configure supervisor lists in a service channel to view the list of active work items across service channels and queues.

Before you begin

Role required: sn_channel_mgmt.admin

About this task

A database view that defines table joins is used for generating reports for a supervisor list. For example, you can create a database view that can join the Case table to the Interaction and Metric tables. When you use this database view, and create a supervisor list to report on the active work items, you may include fields from any of these three tables. For more information, see Database views.

Note: You can configure three supervisor lists for each service channel. The first three lists with the lowest order number appear in Channel Management.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Channel Management** > **Service Channels**.
2. Select the service channel to which you want to add a supervisor list.
3. Click the **Supervisor Lists** tab.

Note: You must add the Reports related list if you do not see the **Supervisor Lists** tab.

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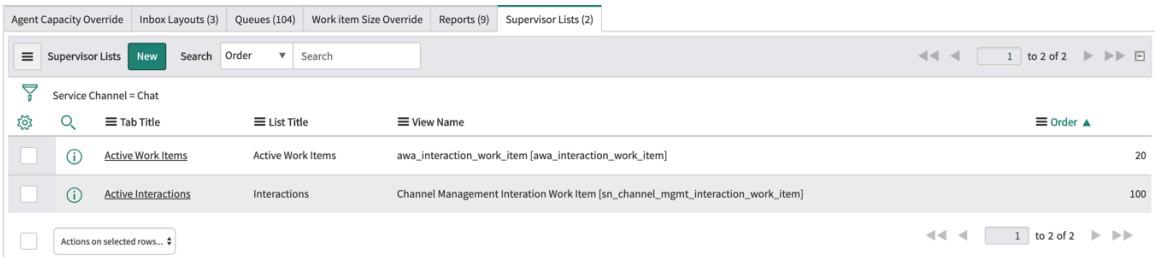
4. Click



New.

5. On the form, fill in the fields.

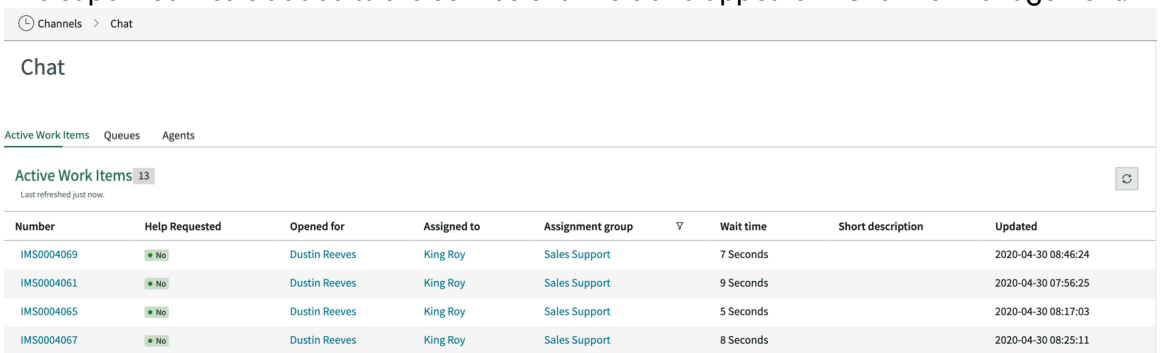
Supervisor Lists form

Field	Description
List Title	Display name for the list.
Tab Title	Title for the tab that appears in the manager workspace.
Service Channel	Service channel in which the list appears.
View Name	Database view for the service channel.
Order	Number that displays the order. **Note:** The first three lists with the lowest order number appear in Channel Management.

6. Click **Submit**.

Result

The supervisor list is added to the service channels and appears in Channel Management.



Use extension points to configure the sort order

Use scripted extension points to configure the sort order for the columns in the All Agents and All Queues lists for Channel Management.

Before you begin

Role required: admin

About this task

Use the *`sn_channel_mgmt.ChannelMgmtExtensionPoint`* extension point and create an implementation to configure the sorting mechanism for the All Agents and All Queues lists in Channel Management. You can create multiple implementations; however, the implementation with the lowest order number is executed.

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Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_channel_mgmt.ChannelMgmtExtensionPoint`.
3. On the form banner, click the link **here** to edit the record.
4. Click **Create Implementation** in the related links to create your sorting mechanism extension point script.
5. Add or modify the columns and sort directions in the `vardata` section.

```
    /*
        This method is used to define the default sort order for Agents list in 'Channel & Queue Management' module in
Manager workspace. Please specify the columns and direction of sort in appropriate format.
        Eg: var data = [{
                column: 'can_take_work',
                direction: 'DESC'
            }, {
                column: 'presence_state',
                direction: 'ASC'
            }, {
                column: 'utilization',
                direction: 'ASC'
            }];
    */
    getDefaultSortOrderForAgentsList: function(){
        var data =[];
        return data;
    },
```

6. Click **Update**.

Result

The sorting mechanism is applied to the defined columns in the All Queues and All Agents lists in Channel Management.

Example:

The Presence State column with **ASC** as a sort direction in the extension script displays the Presence State records in an ascending order in the All Agents list. For more information, see Track and analyze agents' performance.

Configure columns in the All agents list

Use scripted extension points to configure the columns in the All agents list for Channel Management.

Before you begin

Role required: admin

About this task

Use the *`sn_channel_mgmt.AgentListColumns`* extension point to modify the current implementation to configure the columns for the All agents list in Channel Management.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for *`sn_channel_mgmt.AgentListColumns`*.
3. On the form banner, click the link **here** to edit the record.
4. Click **AgentListColumnsOOBImpl** in the related list to configure the columns for All agents.
5. Add or modify the columns in the `getColumns` section.

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Example

```
13      * {Object}:  object containing the following properties:
14      *   columns - list of columns for 'Agents' List. Each column has the following properties
15              label: Column Label
16              internalType: Internal type of a column
17              columnOrder: Order at which this column appears in the UI (default: 100000)
18              active: Used to show/hide a column (default: active)
19              table: Table name for columns with internal type as reference
20              useRelativeTime: set to true, in order to display the relative time for columns with internal type as glide_date_
21              selectedTabIndex: used to specify the tab index to navigate to. Used in case of reference fields
22              isSortable: used to enable/disable sorting
23              isFilterable: used to enable/disable filtering
24      *   rows - data for all the defined columns against each <Agent, Service Channel>
25      */
26      getColumns: function(agentIds, channelIds) {
27          var rows = {};
28          var columns = {};
29
30          return {
31              "columns": columns,
32              "rows": rows
33          };
34      },
35
36      type: 'AgentListColumns'
```

6. Click **Update**.

Configure columns in the All queues list

Use scripted extension points to configure the columns in the All queues list for Channel Management.

Before you begin

Role required: admin

About this task

Use the *`sn_channel_mgmt.QueueListColumns`* extension point to modify the current implementation to configure the columns for the All queues list in Channel Management.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for *`sn_channel_mgmt.QueueListColumns`*.
3. On the form banner, click the link **here** to edit the record.
4. Click **QueueListColumnsOOBImpl** in the related list to configure the columns for All agents.
5. Add or modify the columns in the `getColumns` section.

Example

```
13      * {Object}:  object containing the following properties:
14      *   columns - list of columns for 'Queues' List. Each column has the following properties
15              label: Column Label
16              internalType: Internal type of a column
17              columnOrder: Order at which this column appears in the UI (default: 100000)
18              active: Used to show/hide a column (default: active)
19              table: Table name for columns with internal type as reference
20              useRelativeTime: set to true, in order to display the relative time for columns with internal type as glide_date_
21              selectedTabIndex: used to specify the tab index to navigate to. Used in case of reference fields
22              isSortable: used to enable/disable sorting
23              isFilterable: used to enable/disable filtering
24      *   rows - data for all the defined columns against each queue
25      */
26
27      getColumns: function(queueIds, queueGroups) {
28          var rows = {};
29          var columns = {};
30          return {
31              "columns": columns,
32              "rows": rows
33          };
34      },
35
36      type: 'QueueListColumns'
```

6. Click **Update**.

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Schedule a daily report

Generate and distribute a daily scheduled report that summarizes the agent's work performance via email.

Before you begin

Role required: sn_channel_mgmt.admin

About this task

The scheduled job *Send Daily Agents Report* executes the event *sn_channel_mgmt.agents_report*, which then triggers the *Daily Agents Report* notification. Next, the notification *Daily Agents Report* executes an email script *daily_agents_reports* to send an email to all managers. To change the existing report, modify the *daily_agents_reports* email script.

Procedure

1. Navigate to **All** > **System Definition** > **Scheduled Jobs**.
2. Search and click **Send Daily Agents Report**.
   The scheduled script *Send Daily Agents Report* form appears.
3. Click the link **here** to edit the record.
4. Select the **Active** check box.
5. In the **Run** field, ensure that the option **Daily** is selected.
   The script, by default, sends the agents' work summary report daily to the managers.
6. Select the **Time zone**.
7. Click **Update** to update the scheduled job or **Execute Now** to execute the scheduled script immediately.

Result

All managers and additional managers of the teams receive an email notification that summarizes their agents' performance.

Setting up Scheduling in Workforce Optimization for Customer Service

Manage events using the team calendar. Create different types of event categories. Use scripted extension points to customize event types.

Configure event categories for Manager Workspace

Add an event category. Create or update field configurations for events. You can also specify if an event category must be excluded when the shift coverage for agents are calculated.

Before you begin

Role required: sn_shift_planning.admin

The following event category configurations are available by default:

- Work
- Meeting
- Training
- Time Off
- Break

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Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Scheduling** > **Event Categories**.
2. In the **Event Categories** list, click **New**.
3. In the **Name** field, enter a name for the event category.
4. If you want to exclude this event category for agent coverage calculation, enable the **Exclude from coverage** check box.
5. In the **Event field configuration** dialog box, edit the following configuration as necessary:

Note: You can remove any property that does not apply to a type of event.

```
{
            "create": {                //Creates an event type
 form
                "attendees": {         //Adds the Attendees
 field
                "mandatory": true,     //Sets this field as
 mandatory
                "readOnly": false,     //Sets this field as
 read-only
                "allowAllUsers": false //Allows you to only add
 users managed by the logged-in user; to add any user, set this
 value to true
                },
                "startDate": {
                "mandatory": true,
                "readOnly": false
                },
                "endDate": {
                "mandatory": true,
                "readOnly": false
                },
                "additionalSelectors": [    //Add custom fields
 to the form
                {
                    "fieldLabel": "Select Shift", //Name of the
 field that displays on the form
                    "table":
 "sn_shift_planning_shift_plan", //Name of the table referenced
 by the field
                    "field": "name", //Any field from the
 selected table whose display values must be shown in the
 custom field
                    "value": "",
                    "mandatory": true,
                    "additionalQueryString": ""
                }
                ]
            },
            "edit": {                    //Edit an event type
 form
                "attendees": {
                "mandatory": true,
                "readOnly": false,
```

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```
                "allowAllUsers": false
                },
                "startDate": {
                "mandatory": true,
                "readOnly": false
                },
                "endDate": {
                "mandatory": true,
                "readOnly": false
                },
                "additionalSelectors": [
                {
                    "fieldLabel": "Select Shift",
                    "table": "sn_shift_planning_shift_plan",
                    "field": "name",
                    "value": "",
                    "mandatory": true,
                    "additionalQueryString": ""
                }
                ]
            }
        }
```

6. Click **Submit**.

Create event types to display them on the team calendar

Create multiple events from the same category and add them to the team calendar.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Scheduling** > **Event Configuration**.
2. Click **New**.
3. On the form, fill in the fields.

Event configuration form field

Field	Description
Name	Unique name for the event type.
Priority Order	Priority of the event type that you want to exclude from the coverage. The higher the number means the higher the priority. For example, let's say you are attending a work event for four hours in a day. You have marked that time window as both a time off and as a meeting event type. If time off has a higher order of priority, then the application excludes that event type from coverage.
Color	Color that identifies this type of event in the team calendar.
Active	Option that when enabled, displays the event type on the calendar.
Category	Type of event, for example, meeting, break, or time off.

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4. Click **Submit**.

Note: After an event type is assigned to a shift, that event type cannot be deleted.

Configure properties for schedule adherence and conformance

Configure schedule adherence properties to calculate the adherence and conformance of your agents so that you can improve the operational efficiency of your organization.

Before you begin

Role required: admin

About this task

The threshold settings for adherence and conformance indicate how many minutes early or late an agent can clock in or clock out to a scheduled work shift without being considered as non-adherent.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Schedule Adherence** > **Settings**
2. On the form, fill in the fields.

Schedule Adherence properties form

Field	Description
Enable Schedule Adherence	Calculation and information about the agents' adherence to the schedules.
Threshold for early checkin for planned shift (in Minutes)	Time that you can set for early check-in. This time is the acceptable time for an agent to start the work shift before the actual shift time. The default value is 60 minutes. For example, if an agent's planned work shift is 08:00 to 17:00 and the agent clocks in at 07:00, the threshold time allows flexibility and the agent isn't considered as a non-adherent agent.
Threshold for adherence % of Time Worked Summary	Percentage that you can set for a threshold in adherence. The agents who don't qualify to be above the defined threshold value (70%) are considered non-adherent agents.
Lower threshold conformance % of Time Worked Summary	Lower threshold percentage that you can set for flexibility in conformance. The agents who don't qualify for the defined lower and upper conformance threshold values (80-120) are considered as non-conformant agents. The default value is 80%.
Upper threshold for conformance % of Time Worked Summary	Upper threshold percentage that you can set for flexibility in conformance. The agents who don't qualify for the defined lower and upper conformance threshold values (80-120) are considered as non-conformant agents. The default value is 120%.
Default threshold time for clock-out event generation (in Minutes)	Default threshold time to generate an automatic clock-out event if an agent fails to clock out. The default value is 60 minutes. For example, if an agent's planned work shift is 08:00 to 17:00 and the agent fails to clock out at 17:00, the system waits for 60

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Field	Description
	minutes as the threshold time and generates an automatic clock-out event.

3. Click **Save**.

Related topics

Scheduling in Workforce Optimization for Customer Service

Monitor schedule adherence of your agents

Analyze adherence and conformance from the time worked summary

Modify schedule adherence and conformance formulas by using extension points

Configure and tweak the schedule adherence and conformance formulas using scripted extension points so that you can customize them for your organization.

Before you begin

Role required: admin

About this task

Use the *`sn_shift_planning.ScheduleAdherenceExtPt`* extension point and create an implementation to configure the formulas. You can create multiple implementations. However, the implementation with the lowest order number is executed.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Search for `sn_shift_planning.ScheduleAdherenceExtPt`.
3. On the form banner, click the link **here** to edit the record.
4. To create your extension point script, click **Create Implementation** in the related links.
5. Modify the formulas for calculating the schedule adherence and conformance in the `getAdherencePercentage` and `getConformancePercentage` methods.

```
var ScheduleAdherenceExtPtImp = Class.create();
ScheduleAdherenceExtPtImp.prototype = {
    initialize: function() {
    },

    getAdherencePercentage: function(plannedTime, timeNotWorked, availableNonPlannedTime, totalTimeWorked){
        var adherencePercentage = ((plannedTime - timeNotWorked) / (plannedTime + availableNonPlannedTime)) * 100;
        return adherencePercentage;
    },

    getConformancePercentage: function(plannedTime, timeNotWorked, availableNonPlannedTime, totalTimeWorked){
        var conformancePercentage = (totalTimeWorked / plannedTime) * 100;
        return conformancePercentage;
    },

    type: 'ScheduleAdherenceExtPtImp'
};
```

6. Click **Update**.

Result

The schedule adherence and conformance calculations are based on the formulas in the implementation.

Event type extension points in Workforce Optimization for Customer Service

Use extension points to call scripts for event categories such as meeting, time off, or work time.

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To see a list of extension points that you can use for Workforce Optimization for Customer Service, navigate to **System Extension Points** > **Scripted Extension Points**. In the Extension Points list, open the `sn_shift_planning.EventManager`extension point.

Use scripted extension points to integrate customizations without altering the core components in the application code. When customizing a base application, you implement the scripted extension points by creating the custom script includes and registering them against the scripted extension points.

Extension points for event types

Extension point name	Description
`sn_shift_planning.EventManager`	Implement this extension point to customize the logic for the event categories that you create.

You can use extension points to create events such as meeting, training, and time-off requests. For example, for extension point implementations, see the following extension instances in the Implementations related list:

Extension scripts for creating events

Category	Extension Script
Meeting	`AgentScheduleMeetingEventManager`
Break	`AgentScheduleBreakEventManager`
Training	`AgentScheduleTrainingEventManager`
Time off	`AgentScheduleTimeOffEventManager`
Work	`AgentScheduleWorkEventManager`

Related topics

Using extension points to extend application functionality

Synchronize team calendar with Microsoft Outlook

Managers and agents can synchronize their calendars and events with Microsoft Outlook.

As a user with admin role, you can enable this feature by installing Microsoft Exchange Online Spoke. See Set up.

Note: Ensure that you grant the following Graph API permissions to synchronize Microsoft Outlook with team calendar.

Graph API permissions

Permission	Type
Calendars.ReadWrite	Delegated
Calendars.ReadWrite.Shared	Delegated
Calendars.ReadWrite	Application

After installing Microsoft Exchange Online Spoke, set the `sn_wfo_outlook.enable_outlook_sync` system property to `true` in the System

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Properties [sys_properties] table. Add the email IDs that you want to synchronize in the User [sys_user] table.

Setting up Teams Workforce Optimization for Customer Service

Organize your teams into assignment groups and create reports for those groups so that you can gain visibility into the team's performance.

As an administrator, you can configure KPIs as well as child KPIs. The child KPIs appear when you drill-down into top level KPIs. For example, Closed Cases KPI has P1 Cases, P2 Cases as child KPIs.

Create KPI groups to monitor team performance

Create key performance indicator (KPI) groups with the KPIs that matter most to your teams. When you associate your KPI groups with assignment groups, you can monitor your team's performance.

Before you begin

Role required: sn_team_perf.team_performance_admin

About this task

By default, the KPIs that are associated with your KPI assignment groups are scheduled to collect data daily. The KPIs must have the following indicator breakdown:

- Assignment groups
- Assigned to

Procedure

1. Create a KPI group.
   a. Navigate to **Workforce Optimization for Customer Service** > **Team Performance** > **KPI Groups**.
   b. Click **New**.
   c. In the **Name** field, enter a name for the KPI group.
   d. In the **Type** menu, select **Teams**.
   e. Right-click the form header and click **Save**.

      You can add up to five KPIs to a KPI group. For more information about KPIs and how the aggregates are calculated, see the overview video in the Teams example section.
2. Add KPIs to a KPI group.
   a. In the **KPIs** related list, click **New**.
   b. In the **KPI** field, select the KPI to apply for this group.
   c. Click **Submit**.
3. Add KPI assignment groups to the KPI group.

   Note:

   - You can associate a KPI assignment group only to one KPI type.
   - You can add additional managers to each assignment group.
   - You can associate a user with a KPI group as the primary assignment group for that user.

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a. In the **Assignment Groups** tab, click **Edit**.

b. Move the desired assignment groups from the Collection to the Assignment Groups list.

c. Click **Save**.

Add managers to a KPI assignment group

Assign one or more managers to each KPI assignment group so that they can gain visibility into the group and monitor the team's performance.

Before you begin

Role required: sn_wfo_admin or admin

About this task

You can associate a user with a primary assignment group by selecting the group in the user record.

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Team Performance** > **Additional Managers**.
2. Click **New**.
3. In the **Assignment Group** field, select an assignment group.
4. In the **Manager** field, select a manager you want to add for this assignment group.
5. Click **Submit**.

What to do next

Analyze the performance trends for your teams.

Setting up Coaching in Workforce Optimization for Customer Service

Manage agent skills and assess the quality of completed tasks. Use predictive intelligence to recommend skills for agents. Train your agents with internal and external learning content.

Configure an indicator to display in the Coaching Overview tab in Workforce Optimization for Customer Service

Add a system property to display the desired indicator in the Coaching Overview tab in the Coaching application.

Before you begin

> **Important:** This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Set the map application scope to **Coaching**. For information on how to set the scope, see Set map application scope.

Role required: admin

About this task

Replace the existing indicator with any Performance Analytics indicator that has the Assigned to and Assignment group breakdowns to display in the Coaching Overview tab in the Coaching application.

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Procedure

1. In the application navigator, enter `sys_properties.list`.
2. Click **New**.
3. Enter the following field values.

System property form field

Field	Value
Name	sn_coaching.coaching_overview_default_quality_indicator
Application	Coaching
Type	string
Value	{"title": "<name>", "sys_id": "<sys id>"} where <name> is the name of the indicator that you want to display in the Coaching Overview tab and <sys id> is the unique record identifier (sys_id) of the indicator. Example: ○ Name: % of P1 incidents resolved on first call. ○ Sys ID: 0423e59387401010ca99e12397cb0bbb {"title": "% of P1 incidents resolved on first call", "sys_id": "0423e59387401010ca99e12397cb0bbb"}
Read roles	sn_coaching.coach

4. Click **Submit**.
   The configured indicator replaces the existing indicator in the Overview tab in the Coaching application in Workforce Optimization for Customer Service.

Setting up skill prediction in Workforce Optimization for Customer Service

Collect skill data based on skills agents have used for case resolution. Use supervised learning to recommend these skills for agents to resolve similar open case. You can also find patterns in how skills are used for case resolution and use unsupervised learning to recommend skills for agents.

Before you begin

Set up skills. For more information, see Skills Management.

Predictive Intelligence must be set up and configured on your instance to train the models. For more information, see Predictive Intelligence.

Activate the Skill Recommendation application plugin (com.snc.sre) to use predictive intelligence for recommending skills.

Role required: sn_sre.admin

Procedure

1. Configure the properties for the Skill Recommendation application.
2. Run the solution definition models such as *`Recommend similar skills for cases`* or *`Recommend skills from similar cases`* to train the supervised and unsupervised solutions.

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For more information on training a solution, refer to Create and train a similarity solution.

3. Run the *Start skill prediction* scheduled job everyday to start predicting skills for cases or agents.
   This scheduled job is inactive by default. When you activate it, the job runs daily at 1:00 AM on all cases resolved the previous day. The job then adds the skills to the User Predicted Skill [sn_sre_user_predicted_skill] table and Task Predicted Skill [sn_sre_task_predicted_skill] table.

   Note: Recommended skills will start appearing once the number of records in [sn_sre_task_predicted_skill] table exceeds the value defined in the [sn_sre.user_predicted_skill_threshold] Components installed with Workforce Optimization for Customer Service.

Use extension points for skill prediction

Use scripted extension points to customize skill prediction for tasks.

Before you begin

Role required: admin

About this task

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.

Note that the Skill Recommendation extension point is included with the Skill Recommendation (com.snc.sre) plugin.

Procedure

1. Navigate to **All** > **System Extension Points** > **Client Extension Points**.
2. From the Extension Points list, select **Skill Recommendation** (sn_sre.SkillPredictionAPI).
3. Either create a new skill recommendation implementation or modify an existing one.
   - To create a new skill recommendation implementation, click **Create Implementation**.
   - To modify an existing implementation, from the Implementations related list, select a class.
4. Modify the script as required.
5. Click **Update**.

Configure a list menu to display in the Learning tab in Workforce Optimization for Customer Service

Add list or list categories to modify the list menu for Coaching with Learning in the Coaching application in Workforce Optimization for Customer Service.

Before you begin

Important: This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Set the map application scope to **Coaching With Learning**. For information on how to set the scope, see Set map application scope.

Role required: admin

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Procedure

1. In the application navigator, enter `sys_ux_list_menu_config.list`.
2. Click **Learning list** record.
3. Under UX list category, click **New**.
4. Enter the following field values.

Learning list form field

Field	Value
Title	Enter the name of the list category.
Description	Enter a short description about the list category.
Order	Enter a value to set the position of the list category in the current list.
Active	Select the check box to make the list category visible.

5. Click **Submit**.
6. Under UX Lists, click **New** to create lists under that list category.
7. Enter the following field values.

UX lists form field

Field	Value
Title	Enter the name of the list.
Table	Select the table for the data that you want to display in the list.
Configuration	Select **Learning List**.
Columns	Select the columns that you want to display for the table.

8. Click **Submit**.
9. Click **Update**.

Integrate Coaching with Learning with third-party learning management systems

Connect your ServiceNow instance with third-party learning sites to pull learning content into your repository.

Before you begin

> **Important:** This feature is available with the Workforce Optimization for CSM Configurable Workspace (sn_csm_wfo_workspa) from the ServiceNow Store. To enable this feature, see Activate Workforce Optimization for CS configurable workspace.

Role required: learning_admin

About this task

Applications to integrate third-party learning sites

Activating the Coaching with Learning (sn_coach_lrn) plugin enables the following applications from the ServiceNow Store:

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- Enterprise Service Management Integrations Framework
- Cornerstone spoke
- Pluralsight spoke
- Udemy spoke

Procedure

1. Create the integration source for each of your third-party systems.

   Note: Cornerstone, Pluralsight, and Udemy integrations are available by default.

   a. Navigate to **Integrations Framework** > **Source**
   b. Click **New**.
   c. In the **Name** field, enter the name of the integration source, for example, Pluralsight.
   d. Right-click the form header and click **Save**.
   e. In the Integration Services related list that appears, click **New**.
   f. On the form, fill in the fields:

   Integration service form field

Field	Description
Name	Name of the integration service, for example, Pluralsight.
Import set tables	List of intermediate tables which store records from the third-party system. **Note:** This field is enabled only when a Scheduled pull service is selected in the **Service type** field.
Flow	Flow that interacts with the third-party system to pull the required data.
Active	Option to indicate that the integration service is available for use.
Application	Application which includes the integration service record.
Source	Name of the third-party system with which you want to integrate your application.
Order	Order in which you want to run transformation scripts.
Service type	Option to indicate the type of service **Scheduled pull** or **Ondemand Push**.
Retry policy	Configuration set to push a record if the last push fails. **Note:** This field appears only when an Ondemand Push service is selected in the **Service type** field.

   g. Click **Submit**.

2. Integrate your ServiceNow instance with your third-party learning source accounts.

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To integrate with this third-party learning source	Do this
Pluralsight Skills account	Use an API key to authenticate the Service Now requests. Follow the steps in Set up the [illegible] to perform the integration.
Cornerstone application	Register an OAuth application in Cornerstone and authenticate requests from ServiceNow. Follow the steps in Set up the Cornerstone [illegible] to perform the integration.
Udemy application	**Note:** You must manually configure fields such as logos and course reas signments in the learning system config uration table.

The records from the third-party content are pulled into your ServiceNow instance using and API call. To successfully run this API call, you must do the following:

a. In the application navigator, enter `sys_properties.list`.

b. For each of the following properties, set the value to **1638400**:

- com.glide.transform.json.max-partial-length
- com.snc.process_flow.reporting.serialized.val_size_limit

For more information on these system properties, see Coaching With Learning System Properties.

3. Activate schedule flows to integrate third-party learning content.

a. Navigate to **Process Automation** > **Flow Designer**

b. In the **Flows** section, select each of the following flows and click **Activate**:

- Trigger Cornerstone Learning Sync
- Trigger Pluralsight Learning Sync
- Trigger Udemy Learning Sync

c. Navigate to **Learning** > **Administration** > **Learning System Configuration**

d. Select each of the third-party learning sources and set the **Active** field to **true**.
Schedule flows automatically run on a scheduled basis to synchronize third-party learning content into your ServiceNow instance.

4. After configuring the third-party integration sources, you can refresh the entire third-party content or synchronize new and updated services into your ServiceNow instance.

- To refresh the entire content, set the *full_pull* property to **true**.

  Note: We recommend that you periodically refresh the entire content.

- To synchronize new and updated services, set the *full_pull* property to **false**.

a. Open any integration source for which you want to pull content.

b. Click **Run Job**.
The integration framework pulls the corresponding third-party learning courses into the Learning External Content [sn_lc_external_content] table on your ServiceNow instance.

When synchronizing new and updated services, the content is populated as described in the table.

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Third-party learning courses

Third-party content	New and Updated Services synchronized
Udemy	○ Courses ○ User activity
Cornerstone	○ Users ○ Courses ○ User activity
Pluralsight	○ Courses ○ Course progress such as percentage

What to do next

Add external courses to Coaching With Learning

External Content Integration Sources

When you integrate Coaching With Learning with third-party learning management systems, the source record for Cornerstone OnDemand, Pluralsight, and Udemy applications are automatically created in the Enterprise Service Management Integrations Framework. These source records contain a predefined set of properties and integration services.

Integration source record for Cornerstone Ondemand

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Cornerstone.
Properties	Set of properties that are predefined for Cornerstone OnDemand application. • **page_size**: Number of records that are pulled through an API call from Cornerstone OnDemand application. • **full_pull**: When set to **True**, all the active users and learning courses from the Cornerstone OnDemand system are pulled into the ServiceNow instance. When set to **False**, modified users, modified transcripts, and updated courses are pulled from the Cornerstone OnDemand system into the ServiceNow instance. • **url_prefix**: Deep link prefix to pull learning objects from Cornerstone OnDemand system during run time. • **pull_offset_hours**: The time, in hours, calculated from the last successful run for the next synchronization to occur For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.

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Integration source record for Cornerstone Ondemand (continued)

Field	Description
Integration Services	Services interact with Cornerstone Ondemand application to pull or push learning courses. • **Course assign service**: Assigns a course to an employee in the Cornerstone Ondemand application. • **Sync users**: Maps users in the Cornerstone OnDemand system to users in the ServiceNow system using email Ids. **Note:** If you want to use user_id or user_name field for mapping users, then override**getCornerstoneUser method** in the sn_lc.UserMappingUtil script. • **Courses**: Pulls learning courses from Cornerstone OnDemand system into ServiceNow. • **User activity**: Pulls details of user activity on learning courses from Cornerstone OnDemand system into ServiceNow.

Integration source record for Pluralsight

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Pluralsight.
Properties	Set of properties that are predefined for the Pluralsight system. • **page_size**: Number of records that are pulled through an API call from Pluralsight. • **full_pull**: When set to **True**, all the learning courses are pulled from Pluralsight into the ServiceNow instance. When set to **False**, updated learning courses progress is pulled from Pluralsight into the ServiceNow instance. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.
Integration Services	Integration services interact with Plural sight application to pull learning courses into ServiceNow. • **Courses**: Pulls learning courses from Pluralsight into ServiceNow. • **Course progress**: Pulls the progress of learning courses from Pluralsight into ServiceNow.

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Integration source record for Udemy

Field	Description
Name	Name of the record in Enterprise Service Management Integrations Framework: Udemy
Properties	Set of properties that are predefined for the Udemy system. • **page_size**: Number of records that are pulled through an API call from Udemy into ServiceNow. • **full_pull**: When set to **True**, all the learning courses are pulled from Udemy into the ServiceNow instance. When set to **False**, updated learning courses and learning course progress are pulled from Udemy into the ServiceNow instance. • **pull_offset_hours**: Value that is considered for pulling modified records. For example, the last successful run was on 12/12/2021 at 17:00:00, pull_offset_hours is set to 5, and full_pull is set to False. The next pull fetches all the records that have been modified from 12/12/2021 12:00:00 until current date and time.
Integration Services	Integration services interact with Udemy application to pull learning courses into ServiceNow. • Pull Courses: Pulls learning courses from Udemy into ServiceNow. • Pull user activity: Pulls details of user activity on learning courses from Udemy into ServiceNow.

Setting up Demand Forecast in Workforce Optimization for Customer Service

Configure the data that you want to collect, modify forecast parameters, and calibrate manual adjustments using Demand Forecast.

Configure the data collection for resources demands

Define the data you want to collect for cases, interactions, or any table to forecast the number of agents that you require for your staffing needs.

Before you begin

You must have the MetricBase plugin [com.snc.clotho] enabled to use Demand Forecast in Workforce Optimization for Customer Service. For more information, see Requesting the MetricBase product.

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Note:

- When you change the forecast parameters or resource conversion formula, the new values for resource forecasts will not reflect on the team calendar until the **Forecast resources for future** scheduled job is executed. Your administrator can run the scheduled job on-demand to view the changes in the team calendar.
- Once the **Historical data collection** job is run for specific data collection definitions, the column **Is historical data collected** in the Forecast Configurations [sn_agent_forecast_configuration] table is set to **true**. Hence, the historical data collection will not run even if you add data for the past dates from the back-end. Historical data is stored for 1098 days for forecasts set at daily interval. Beyond three years, historical data is cleaned and cannot be saved.

Role required: sn_agent_forecast.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for Customer Service** > **Demand Forecast**.
2. Define the data you want to collect for forecasting agents to resolve cases.
   a. Click **Data Collection Definitions**.

      See the Forecast Configuration table in Scheduling for the list of configurations that are available by default.

   b. Click **New**.
   c. On the form, fill in the fields:

      Forecast Configuration form

Field	Description
Name	Unique name for the collection forecast configuration.
Type	Data Collection Definition type is set to **Collection** by default and collects data using a scheduled job.
Table	Table that is used for collecting data. From the list, do one of the following: ▪ To collect data to forecast cases, select **Cases**. ▪ To collect data to forecast interactions, select **Interactions**.
Condition	Conditions that you can set so that you can capture the data that you need.
Date Field	Data that you can add to forecast for the future.

   d. Click **Submit**.
   e. Create an index for the table you have created using the date field and the conditions you have added to the table. For information on creating a table index, see Create a table index.
3. Add parameters to be defined in the formula to calculate agent count per hour in a day.
   a. Click **Formula Parameters**.
   b. In the **Name** field, enter a name for the parameter.
   c. Do one of the following:

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- If you need to add a value to be calculated for the formula, in the **Value** field, enter the value.
- If you want to use the performance analytics score card API or a custom API, click **Advanced,** and add the script.

The Average Case Work Time and Average Chat Work Time forecast parameters provided by default are examples of how you can use scripts to add the parameters. For a list of parameters provided by default, see Forecast Parameters in Scheduling.

d. Click **Submit**.

4. Configure the resource conversion formula.

a. Click **Resource Conversion Formula**.

b. Click **New**.

c. On the form, fill in the fields.

Forecast Configuration form

Field	Instructions
Name	Name for the resource forecast configuration.
Type	Type is set to **Resource Conversion Formula**.
Formula	Formula to calculate the forecasted number of agents that you need. In the Related Links section, do the following: ▪ Click **Browse Forecast Configuration**, select the forecast configuration to add to the formula and click **Add**. ▪ Click the Browse Forecast Parameter, select the forecast parameter to add to the formula and click **Add**. **Note:** **FC** refers to Forecast Configuration and **FP** refers to Forecast Parameter.

d. Click **Submit**.

5. Associate an assignment group with a Resource Conversion Formula.

You can assign a forecast configuration to multiple assignment groups, but an assignment group can have only one forecast configuration.

a. Click **Group Forecast Configurations**.

b. Click **New** and do the following:

- In the **Assignment Group** field, click the search icon and select the group to which you want to associate a forecast configuration.
- In the **Forecast Configuration** field, click the search icon and select a **Resource Conversion Formula**.

What to do next

Run the *`Collect historical data for demand forecast data collection definitions`* scheduled job. For more information, see Schedule jobs for Demand Forecast.

Related topics

Use Demand Forecast

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Modify forecast parameters to visualize forecast data

Configure and tweak forecast parameters to see how the forecast behaves when you vary the period length, periods to forecast, or algorithm. You can view the modified forecast on the time-series visualization at intervals of 15-, 30-, and 60-minute intervals and daily interval.

Before you begin

Role required: sn_agent_forecast.admin and sn_csm_wfo_workspa.manager

The user with these roles must also be a manager of the assignment group that is associated with the resource conversion formula.

About this task

You can define the start and end dates for which you want to create the forecast data. The start date is always the current date. The end date is calculated based on the period length and the periods to forecast. The periods to forecast is represented in days or hours. For example, if the period length is 1 day and the period to forecast is 30 days, then the end date is 30 days including the current day.
For 15-, 30-, and 60-minute intervals, managers can generate forecast up to 28 days. For daily interval, managers can generate forecast up to 365 days.

Forecast results are displayed with the historical data so that the user can compare the patterns of historical data with the forecast. The historical data of 14 days prior to the current date will be displayed with forecasts of 15-, 30-, and 60-minute intervals. The historical data of four weeks to the prior date will be displayed with forecasts of daily intervals. You can customize and configure historical data to be displayed using the *sn_agent_forecast.number_of_historical_days_in_timeseries_chart* and *sn_agent_forecast.number_of_historical_days_in_daily_timeseries_chart* system properties..

The published forecast is reflected on the team calendar only when the **Forecast resources for future** job is executed.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click **Forecasts**.
4. Select the forecast model for which you want to view the time-series data.
   You can visualize each of the forecast parameters that were created for the forecast model.
5. Click the gear ( )icon.
6. Click the plus (+) sign.
7. Configure the forecast parameter.
   a. From the **Period length unit** list, select the unit for the length of the period to forecast.
   b. In the **Period length** field, enter the duration of the period to forecast.
   c. In the **Periods to forecast** field, enter the number of seasons, which is the period length, for which you want to forecast.
   d. In the **Interval** field, select 15-, 30-, and 60-minute intervals or Daily interval value of the period to forecast.
   e. Click **Update**.

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The forecast is created in **Draft** state. The forecast is calculated and displays in the forecast model. You can analyze the forecast with the new forecast parameters before you publish it.

8. To preview a forecast before publishing it, click **Preview**.
he forecast is calculated using the algorithm and parameters configured in the forecast parameter. When you create a manual adjustment to predict future resources, Demand Forecast overlays the adjustment in the time-series chart.

When you	Then the forecast
Unpublish a published forecast	Become inactive.
Preview an inactive forecast para meter	Displays for the date range for which the forecast para meter was active.
Preview an active forecast	Displays the time-series data for the future time-period.

9. Publish the forecast parameters.
   a. To publish a newly created forecast parameter, click **Save** and then click **Publish**.
   b. To publish an active forecast parameter, click **Publish**.

   Note: You can only have one forecast in **Published** state, which is used to calculate the resources.

   When the forecast parameter is published:
   - The state of the record changes to **Published**.
   - The **Forecast resources for future** job runs daily and uses the published forecast parameters to calculate the agent forecast. The calculation uses the resource conversion formula to calculate the forecast data from the current point forward. You can view the updated resources in the team calendar.
   - Any other forecast parameters that were created would be unpublished and inactive.

What to do next

Create a manual adjustment for a forecast

Adjust forecasts manually to fine-tune them for greater accuracy. Create the adjustment for a specified time period and analyze how it impacts your forecast.

Before you begin

Role required: sn_agent_forecast.admin and sn_csm_wfo_workspa.manager

The user with these roles must also be a manager of the assignment group that is associated with the resource conversion formula.

About this task

Managers can make manual adjustments to the forecasts for 15-, 30-, and 60-minute intervals and daily interval. Managers can generate forecasts with manual adjustments at daily interval and can view the adjustments at a more granular level for that same period at 15-, 30-, and 60-minute intervals.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.

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3. Click **Forecasts**.
4. Select the forecast model for which you want to make a manual adjustment.
5. Click the Manual Adjustments ( ) icon.
6. Make a manual adjustment.
   a. Click the plus (+) sign.
   b. Fill in the following fields.

Manual adjustment form field

Field Name	Description
Name	Unique name for the manual adjustment.
Start Date Time	Date and time when the manual adjustment for the forecast must start.
End Date Time	Date and time when the manual adjustment for the forecast must end.
Adjustment Unit	Unit for the manual adjustment. Available values: ▪ Percentage—adjustment value percentage. For example, if the forecast data shows case count and if the adjustment value is 15, the manual adjustment shows a 15% increase in case count than the forecast data. ▪ Number—adjustment value count. For example, if the forecast data shows case count and if the adjustment value is 15, the manual adjustment shows 15 more cases than the forecast data.
Adjustment Value	The numeric value for which you want to adjust the forecast. The value is applied to each group in the Groups [sys_user_groups] table. The manual adjustment visualization on the time-series chart displays the data for your groups. For example, let's assume that the value is 15 and the unit is number. If you have two groups for a forecast model and both have 2 agents each before you do the manual overlay, when you enter the value as 15, it is applied to each of the two groups and the total value displays as 34. This is calculated as follows: ▪ Two agents for group A + the adjustment value 15 = 17 ▪ Two agents for group B + the adjustment value 15 = 17 The total is 34. If you have two groups for a forecast model and both have a volume (for example: Cases/ Chats) of 2 before you do the manual overlay, when you enter the value as 15, it is applied to each of the two groups and the total value displays as 34. This is calculated as follows: ▪ Two cases/chats for group A + the adjustment value 15 = 17 ▪ Two cases/chats for group B + the adjustment value 15 = 17

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Field Name	Description
	The total is 34.

c. Click **Save**.
The manual adjustment is created in **Draft** state. The manual adjustment is calculated and displays as a green line in the forecast model. You can analyze or update the forecast with this manual adjustment before you publish it.

7. Publish the manual adjustment.

a. Click the saved manual adjustment that you want to use for forecasting resources.

b. Click **Publish**. The state changes to **Ready to Publish**.
When the **Forecast resources for future** job is run, it calculates the forecast, checks for manual adjustments, applies those values if any, and moves it to the **Published** state.

Note:

- When you unpublish a forecast, it moves to **Draft** state. You can delete a forecast that is in **Draft** state.
- If you want to end a manual adjustment after it has started and before its end date, you can click **End Now**.

The forecast will no longer be used in the resource conversion formula.

When the manual adjustment is published:

- The state of the record changes to **Published**.
- The adjusted values will be used in the resource conversion formula and the demand forecast displayed on the calendar.
- Any other manual adjustment configurations that were created would be unpublished and moved to **Draft** state.

Migrate to 15-minute forecasting

Migrate to 15-minute demand forecasting that enables managers to view their agent staffing forecast at 15-minute intervals on the team calendar.

Before you begin

Role required: admin

About this task

Starting with the Tokyo release, 15-minute forecasting is the default forecasting feature. Existing customers can migrate from the 60-minute forecasting to 15-minute forecasting using the following procedure.

Procedure

1. Set the *`sn_agent_forecast.forecast_interval`* system property value to `15`.

a. Set the application scope to Agent Forecast using the application picker.

b. Enter `sys_properties.list` in the navigation filter, and then open the *`sn_agent_forecast.forecast_interval`* property.

c. In the **Value** field, enter `15`.

d. Click **Update**.

2. Deactivate the existing demo data definitions.

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a. Navigate to **All** > **Workforce Optimization** > **Demand Forecast** > **Data Collection Definitions**.

b. Set the **Active** value of **Cases Assigned** and **Chat Interaction Created** demo definitions to **false**.

3. Create new data collection definitions, formula parameters, and group forecast configuration.

   For more info, see Configure the data collection for resources demands.

4. Run the *`Collect historical data`* on-demand job to collect historical data at 15-minute interval.

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

   b. Search for *`Collect historical data`* and select it.

   c. Click **Execute Now**.

5. Run the *`Forecast resources for future`* scheduled job for staffing forecast that can be viewed on team calendar.

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

   b. Search for *`Forecast resources for future`* and select it.

   c. Click **Execute Now**.

Setting up Work scheduler in Workforce Optimization for Customer Service

Customize an existing work scheduler card based on your need. You can also create a work configuration and work scheduler card from scratch and associate them so that managers can view the cards in their work queue.

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Customize a Work Scheduler card using the Next Experience UI Builder

Customize the Work Scheduler card components, such as adding an extra field, or changing the color or order of a field, to display them in the Work scheduler queue.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

About this task

You can duplicate an existing work item variant such as an Incident, Problem, Change Request and customize it based on your needs.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the **My experiences** list, select **Manager Workspace**.
3. Select the Pages icon.

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4. In the **Page** menu, select **Work scheduler**.
5. In the left pane, go to the **Content** section and navigate to **Body (Flex)** > **Work queue (Flex)** > **Sidebar**.
6. In the right pane, select the icon ( ) in the **Work item cards default** sub-page.
7. In the left pane, select **Body (Flex)** > **Viewport1**.
8. In the right pane, select the icon ( ) next to a card, for example, **Incident default**, that you want to configure.
9. To duplicate the selected variant, in the left pane, in the **Variants** section, hover over the variant you want to duplicate, select the ( ) icon and select **Duplicate**.
10. Hover over the variant you have duplicated, select the ( ) icon and select **Edit conditions**.
11. In the **Order** field, set the order to be the lowest value so that this variant will display in manager workspace.

    Tip: You can only display one variant for a work item type.

12. Click **Save**.
13. Customize the variant you've created using any of the tasks or steps listed in Create a Work scheduler card using the Next Experience UI Builder.

Example:

If you'd like to configure this in the Work Scheduler card	Refer to
Add fields	Create page scripts for Work scheduler and refer to the Create the **Transform workItem to cardProps** page script steps.
Add an avatar	Configure an avatar component for Work scheduler

Related topics

Create a page in UI Builder

Set up a work configuration

Create a work configuration for a work item. Add filters that display key information that the manager wants to analyze. This work configuration will determine how the work items display on the Work scheduler calendar in manager workspace.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: sn_wfo_work_sched.admin

Procedure

1. Navigate to **All** > **Work Scheduler** > **Work Configurations**.
2. Click **New**.

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3. On the form, fill in the fields.

Field	Description
Name	Unique name for the work configuration.
Table	Table for which you want to create the work configuration. Case table is available by default to create work configurations.
Description field	The field from the selected table that you want to use for describing the work item.
Assigned to field	The field from the selected table that you want to use for assigning an agent to the work item.
Assignment group field	The field from the selected table that you want to use for assigning a group to the work item.
Start date field	The field from the selected table that you want to use to display the start date for the work item.
End date field	The field from the selected table that you want to use to display the end date for the work item.
Default color	The preferred color to display the work item card in the manager workspace.
UX app route	The route where the card layout is defined for this work item type. The route displays in UI Builder in the list of experiences. This UX app route determines the layout of the work item card. By default, it is set to **Default card**, which displays the following fields: ○ Description field ○ Assigned to field ○ Assignment group field ○ Start date field ○ End date field If you need additional fields, you must add them in the **Extra fields** field. For information on defining a card layout, see Create a Work Scheduler card using UI Builder.
Order	The display order of the work item.
Extra fields	**Important:** If you need additional fields on the selected table that you would like to display in the work item card in the manager workspace, you must add it in this field.
Matching rule	Select a matching rule for the work configuration.

4. Right-click the form header and click **Submit**.

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5. Create a work configuration filter.

   a. In the **Work Configuration filters** related list, click **New**.

   b. In the **Name** field, enter a unique name for the filter.

   c. Right-click and save the form to add the selected table.

   d. Add the desired conditions for the work configuration filter.
   For information on adding conditions, see Condition builder.

   e. Select **Update**.

Create a Work scheduler card using the Next Experience UI Builder

Create a work scheduler card and add the components that you want to display based on your needs in the Work Scheduler application in manager workspace.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the **My experiences** list, select **Manager Workspace**.
3. Select the Pages icon.
4. In the **Page** menu, select **Work scheduler**.
5. In the left pane, go to the **Content** section and navigate to **Body (Flex)** > **Work queue (Flex)** > **Sidebar**.
6. In the right pane, select the icon ( ) in the **Work item cards default** sub-page.
7. In the left pane, select **Body (Flex)** > **Viewport1**.
8. In the right pane, select **+Add** and enter a name for the card.
   The **Path** field is automatically populated.
9. Select **Create**.
   A new card is created.

   Important: After you create the work scheduler card, you must select the name of this card in the **UX app route** field in the work configuration you have created. For information on setting up a work configuration, see Set up a work configuration.

10. Select **Done**.
    Follow the steps listed in each of the topics below in the given sequence to customize Work scheduler.

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Related topics

Create a page in UI Builder

Create a client state parameter for Work scheduler

Add custom client state parameter values to add properties to the card components.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. Select the Client state icon ( ).
2. In the Client state parameters section, click **+Add**.
3. Create the client state parameter.
   a. In the **Name** field, enter *cardProps*.
   b. From the **Type** menu, select *JSON*.
   c. In the **Initial value** field, select **Edit**.
   d. In the **Initial value** pop-up screen, enter the following code:

```
{
    "tagline": {},
    "heading": {},
    "dropdowns": [],
    "content": [],
    "assignedTo": null,
    "aria": {}
  }
```

   e. Select **Apply**.

   Here's a demo on how to create client state parameters.

What to do next

Create page scripts for Work scheduler

Related topics

Create and bind a client state parameter to a component

Create page scripts for Work scheduler

Add custom page scripts for the Work scheduler so that you can update the client state through events or update transform workItem object to properties.

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Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

About this task

Add the *Handle card clicked* and the *Handle card action clicked* page scripts to handle events that are generated when the card and its actions are clicked.

Add the *Transform workItem to cardProps* page script to transform the *workItem* object in the Work queue to properties for the card components.

Note: If you have customized a Work scheduler card, you can follow the steps below to add client scripts.

Procedure

1. Select the Client Scripts icon (</>).
2. Create the *Handle card clicked* page script.
   a. In the **Page scripts** section, click **+Add**.
   b. In the **Script name** field, enter *Handle card clicked*.
   c. In the **Script Includes** section, add the following script:

```
/**
* @param {params} params
* @param {api} params.api
* @param {any} params.event
* @param {any} params.imports
* @param {ApiHelpers} params.helpers
*/
function handler({api, event, helpers, imports}) {
  const {workItem} = api.context.props;
  api.emit('CARD_CLICKED', {workItem});
}
```

3. Create the *Handle card action clicked* page script.
   a. In the **Page scripts** section, click **+Add**.
   b. In the **Script name** field, enter *Handle card action clicked*.
   c. In the **Script Includes** section, add the following script:

```
/**
* @param {params} params
* @param {api} params.api
* @param {any} params.event
* @param {any} params.imports
* @param {ApiHelpers} params.helpers
*/
function handler({api, event, helpers, imports}) {
  const {workItem} = api.context.props;
  const {action: actionItem} = event.payload;
  api.emit('CARD_ACTION_CLICKED', {workItem, actionItem});
```

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```
}
```

4. Create the **Transform workItem to cardProps** page script and attach the *WorkSchedulerUIBCardUtils* script include.

   a. In the **Page scripts** section, click **+Add**.

   b. In the **Script name** field, enter *Transform workItem to cardProp*.

   c. In the script editor, add the following script:

```
/**
* @param {params} params
* @param {api} params.api
* @param {any} params.event
* @param {any} params.imports
* @param {ApiHelpers} params.helpers
*/
async function handler({api, event, helpers, imports}) {
    const {workItem} = api.context.props;
    const {mappingFields, recordFields} = workItem;
    const cardUtils =
 imports['sn_wfo_work_sched.WorkSchedulerUIBCardUtils']();
    const fallbackValueLabel = await helpers.translate('<not
 defined>');
    const dropdownItems = workItem.tableMetadata.canDelete
        ? [{id: 'delete', label: await
 helpers.translate('Delete')}]
        : [];
    // Fields for getContent() and getAria()
    const contentFields = [{
        name: 'assigned_to',
        label: await helpers.translate('Assigned to')
    },
    {
        name: 'assignment_group',
        label: await helpers.translate('Assignment group')
    },
    {
        name: 'start_date',
        label: await helpers.translate('Start date')
    },
    {
        name: 'end_date',
        label: await helpers.translate('End date')
    }];
    // Create cardProps
    const cardProps = {};
    cardProps.tagline = {
        label: workItem.recordFields._row_data.displayValue
 || null
    };
    cardProps.heading = {
        label: mappingFields.description ?
 mappingFields.description.displayValue : fallbackValueLabel
    };
    cardProps.dropdowns = dropdownItems.length > 0
        ? [{id: 'dropdown1', items: dropdownItems, icon:
 'ellipsis-v-outline'}]
```

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```
        : [];
    cardProps.content = await cardUtils.getContent(helpers,
 contentFields, workItem, null, null, true);
    cardProps.aria = await cardUtils.getAria(helpers,
 contentFields, workItem, null, true);
    cardProps.assignedTo = mappingFields.assigned_to ?
 mappingFields.assigned_to.displayValue : null;
    api.setState('cardProps', cardProps);
}
```

To customize the display of the fields, refer to https://developer.servicenow.com/dev.do#!/reference/next-experience/utah/now-components/now-label-value-stacked/overview.

5. Click **Save**.

   Here's a demo on how to create page scripts for Work scheduler.

What to do next

Define the workItem property in the Work scheduler page configuration

Related topics

Define and bind client scripts to components

Define the workItem property in the Work scheduler page configuration

Add the *workItem* property to the Work scheduler page configuration to receive the *workItem* object provided by the work queue.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. In the **Page configuration** section, select the **Config** tab.
2. In the **Properties** section, select **Edit**.
3. In the **Edit properties** pop-up window, select **+Add**.
4. In the **Property name** field, enter *workItem*.
5. From the **Type** menu, select *JSON*.
6. Select **Add**.
7. Select **Save**.
   The *workItem* property is created.
8. Hover over the *workItem* property and select the Dynamic data binding icon ( ).
9. In the *workItem* field, type *@state.workItem*.
10. Click **Save**.

    Here's a demo on how to define the workItem property in the Work scheduler page configuration.

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What to do next

Define event mappings for Work scheduler

Define event mappings for Work scheduler

Add event mappings required for card interactions and for the card properties transformation to the page configurations in Work scheduler.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. In the **Page configuration** section, select the **Events** tab.
2. Attach the *`Transform workItem to cardProps`* to the **Page ready** event.
   a. In the **Page ready** menu, select **+Add a new event handler**.
   b. In the pop-up screen, go the Scripts section and select *`Transform workItem to cardProps`*.
   c. Select **Add**.
3. Attach the *`Transform workItem to cardProps`* to the **Page ready** event.
   a. In the **Page ready** menu, select **+Add a new event handler**.
   b. In the pop-up screen, go the Scripts section and select *`Transform workItem to cardProps`*.
   c. Select **Add**.
4. Attach the *`Transform workItem to cardProps`* to the **Page property changed** event.
   a. In the **Page property changed** menu, select **+Add a new event handler**.
   b. In the pop-up screen, go the Scripts section and select *`Transform workItem to cardProps`*.
   c. Select **Add**.
5. Attach the *`CARD_CLICKED`* and *`CARD_CLICKED (Work item cards)`* events.
   The **Create an event** popup screen displays.

To Attach	Do this
The *`CARD_CLICKED`* **event**	**a.** In the **Dispatched events** section, select **+Add**. **b.** In the **Event label** field, enter *`CARD_CLICKED`*. **c.** From the **Target parent event handler** menu, select *`CARD_CLICKED (Work item cards)`* **d.** Click **Add**.

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To Attach	Do this
The *CARD_ACTION_CLICKED (Work item cards)* **event**	**a.** In the **Dispatched events** section, select **+Add**. **b.** In the **Event label** field, enter *CARD_ACTION_CLICKED*. **c.** From the **Target parent event handler** menu, select *CARD_ACTION_CLICKED (Work item cards)* **d.** Click **Add**.

Here's a demo on how to define event mappings for the Work scheduler.

What to do next

Configure container components for Work scheduler

Related topics

Events in UI Builder

Configure container components for Work scheduler

Present information in an intuitive format using the Card Base Container component.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

About this task

For more information about the Card Base Container, see the Components section in the Horizon design system website.

Procedure

1. In the **Content** section, select **+Add component**.
2. In the **Components** pop-up screen select **Card Base Container**.
3. In the **Config** tab, set the interaction and aria properties.
   - From the **Interaction** menu, select *Click*.
   - In the Accessibility section, select the Dynamic data binding icon
   - From the **ARIA Properties** list, select *@state.cardProps.aria*.
4. Select the **Events** tab.
5. In the **Card clicked** menu, select **+Add a new event handler**.
   The Event handler preview pop-up screen appears.
6. In the **Scripts** section, select *Handle card clicked*.
7. Select **Add**.

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8. Select **Save**.

Here's a demo on how to configure container components in Work scheduler.

What to do next

Configure a Work scheduler card heading component

Configure a Work scheduler card heading component

Customize the Work scheduler heading component to display the title based on your needs.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

About this task

For more information about the Card Base Header, see the Components section in the Horizon design system website.

Procedure

1. In the **Content** section, select **+Add component**.
2. In the **Components** pop-up screen select **Card Base Header**.
   The selected container displays in the right pane.
3. Configure the header component.
   a. In the **Config** tab, hover over the **Dropdowns** section and select the Dynamic data binding icon .
   b. From the **Dropdowns** menu, select `@state.cardProps.dropdowns`.
   c. Hover over the **Heading** section and select the Dynamic data binding icon .
   d. From the **Heading** menu, select `@state.cardProps.heading`.
   e. Hover over the **Tagline** section and select the Dynamic data binding icon .
4. Add **Handle card action clicked** to the **Card header action clicked** event.
   a. Select the **Events** tab.
   b. In the **Card header action clicked** section, select **+Add a new event handler**.
   c. From the **Tagline** menu, select `@state.cardProps.tagline`.
   d. In the **Event handler preview** pop up screen, from the **Scripts** section, select **Handle card action clicked**.
   e. Click **Add**.
5. Click **Save**.

Here's a demo on how to configure a Work scheduler card heading.

What to do next

Configure a display type component for a Work scheduler card

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Configure a display type component for a Work scheduler card

Add the *Label value stacked* display work item fields within the card.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. In the **Content** section, navigate to **Body(Flex)** > **Card Base Container (Flex)** > **Card Base Header**.
2. Right-click **Card Base Header** and select **Add component after**.
3. In the pop-up screen, select the **Label value stacked** component.
4. In the left pane, select **Label value stacked**.
5. In the right pane, select the **Config** tab and configure the size, alignment, and items.
   a. In the Alignment menu, select *Horizontal-equal*.
   b. In the Size menu, select **Small**.
   c. Hover over **Items**and select the Dynamic data binding icon .
   d. In the **Items** menu, enter *@state.cardProps.content*.
   e. In the **Item min, width** field, enter `75 px`.
   f. Enable **Wrap text** and **Truncated** options.
   g. Click **Save**.

   Here's a demo on how to configure a display type component for a Work scheduler card.

What to do next

Configure an avatar component for Work scheduler

Related topics

Manage the visual style of UI Builder experiences

Configure an avatar component for Work scheduler

Use the *Container* component to add an avatar and the user name of the work item assignee.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

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Procedure

1. In the **Content** section, navigate to **Body(Flex)** > **Card Base Container (Flex)** > **Card Base Header**.
2. Right-click **Card Base Header** and select **Add component after**.
3. In the pop-up screen, select the **Label value stacked** component.
4. In the left pane, right-click **Label value stacked** and select **Add component after**.
5. Configure the component.

   a. In the **Components** pop-up screen, select **Container**.

   b. In the **Config** tab, do the following:

      i. Select the Edit component visibility icon ( ).

      ii. Hover over the **Hide component** field and select the Dynamic data binding icon .

      iii. In the **Hide component** field, enter `!@state.cardProps.assignedTo`

      iv. In the **Direction** menu, select **Row**.

      v. In the **Styles** tab, in the **Align items** field, select the center icon.

      vi. Select **Save**.

6. To add the Avatar component, select **Container(Flex)** > **+Add component**.
7. Select **+Add component**
   The Components pop-up screen appears.

To	Do this
Add the Avatar component	In the configure tab, set the size, user name, and tooltip. **a.** In the **Size** menu, select **Medium**. **b.** Hover over the **User name** menu, and select the Dynamic data binding icon . **c.** In the **User name** menu, type **!@state.cardProps.assignedTo**. **d.** Hover over the **Tooltip text** menu, and select the Dynamic data binding icon . **e.** In the **Tooltip text** menu, type **!@state.cardProps.assignedTo**.
Add the Label Value Tabbed component	In the configure tab, set the size, and items. **a.** In the **Size** menu, select **Small**. **b.** Hover over the **Items** field and select the Dynamic data binding icon . **c.** In the Items field, enter `[{value: @state.cardProps.assignedTo}]` **d.** Select **Save**.

Here's a demo on how to configure an avatar component for Work scheduler

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Associate a work scheduler card to the work configuration

Associate the work scheduler card that you've created to the work configuration to display the card in the Work scheduler sidebar.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin, workspace_admin, or ui_builder_admin

Procedure

1. Navigate to **All** > **Work Scheduler** > **Work configuration**.
2. Select the work configuration to which you want to associate the work scheduler card.
3. In the **UX app route** field, select the name of the work scheduler card.
4. Select **Update**.
   The work configuration card displays in Work scheduler in manager workspace.

   For information on setting up a work configuration, see Set up a work configuration.

   For information on creating the work scheduler card, see Create a Work Scheduler card using UI Builder.

Create extension points for Work scheduler

Create extension points to customize your implementation in Work scheduler. For example, if you want your team members to work on an on-site task, you can configure the location of your team members to the work items assigned to them so that they can get to the tasks quickly.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin

You must set the application scope to Work scheduler (sn_wfo_work_sched).

About this task

The *`WorkItemSkillsRecommendationManager`* extension point is available by default.

Procedure

1. Navigate to **All** > **System Extension Points** > **Scripted Extension Points**.
2. Open the *`sn_wfo_work_sched.WorkItemRecommendationManager`* extension point.
3. In the Related Links section, select **Create Implementation**.
4. Define the functions based on your needs to customize your implementation.

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Administer Customer Service Management

Customer Service Management provides various administrative features and tools to configure and manage the application effectively. These include case routing, assignment workbenches, escalation management, domain separation, and knowledge base administration capabilities.

Features and applications for administering Customer Service Management

Feature or application	Description
Anonymous chat	With anonymous chat, consumers can chat with a consumer service agent without logging in to the Consumer Service Portal.
Customer Service Management Workflow Studio actions	Use Flow Designer actions as building blocks to create Customer Service Management business processes.
Domain separation and Customer Service Management	Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.
Extension points in Customer Service Management	Use extension points to call custom scripts in the Customer Service Management application.
Knowledge product entitlements	The Knowledge Product Entitlements application enables administrators to designate the knowledge bases and knowledge articles that customers can view from the Customer Service Portal.
Limit knowledge base access to internal users	Limit access to the information in a knowledge base to internal users.
Quick start tests for Customer Service Management	Use quick start tests to validate CSM functionality after making any configuration changes, such as applying an upgrade or developing an application.
Routing and assigning customer service cases	The case routing feature uses matching rules and assignment rules to identify customer service cases that meet certain conditions and then route those cases to customer service agents.
Assignment workbench	Customer service managers can use the assignment workbench to view a list of agents,evaluate skills and availability, and assign tasks efficiently and intelligently.
Special handling notes	Use the Special Handling Notes application to create notes that bring important information about individual records to the user's attention.

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Features and applications for administering Customer Service Management (continued)

Feature or application	Description
Case and account escalation	Use the escalation feature to highlight specific cases or accounts and raise awareness of important customer issues.
Case action status	Use the case action status feature to indicate the status of cases in the Case list. Agents can easily identify cases that need attention and quickly prioritize their work.
Major issue management overview	Major issue management enables customer communication for issues that impact a wider audience. Use this feature to proactively identify impacted customers, provide information to these customers, and manage the resolution process.
Automatically close customer service cases	Automatically close cases in the Resolved state if customers do not take any action.
Administer Customer Contracts and Entitlements	Customer service managers can perform tasks to maintain service contracts, contract lines, and entitlements.

Anonymous chat

Anonymous chat allows guest users to initiate chat sessions with consumer service agents through the Consumer Service Portal without requiring authentication.

From the Consumer Service Portal, guest users can click the **Chat** link in the portal header to initiate a chat session with a consumer service agent. Clicking this link opens a form that requests some basic information, including the user's name, email address, and type of issue. Completing and submitting the form creates a chat request that is routed to the appropriate agent queue based on the selected issue type. Once the assigned agent accepts the request, a chat session is established. If necessary, the agent can create a consumer record or a case for the guest user, or transfer the chat to another agent.

Setting up anonymous chat

Setting up the anonymous chat feature involves the following steps.

1. Activate the Consumer Service Portal plugin (com.glide.service-portal.consumer-portal).
2. Modify the default anonymous chat record producer or create a new record producer.
3. Create one matching rule for each agent queue.
4. Configure anonymous chat properties.
5. If necessary, modify the Connect actions to provide the desired functionality for consumer service agents in chat conversations. The anonymous chat feature includes these actions: **Create Case for Guest** and **Create Consumer and Case for Guest**. For more information, see Administer Connect actions.

Anonymous chat plugins

The anonymous chat feature requires two plugins which are activated as part of the Consumer Service Portal plugin:

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- Anonymous Connect Support (com.glide.connect.anonymous_support): enables the anonymous chat feature for Connect.
- Connect Support Routing (com.glide.connect.support.routing): routes Connect Support requests to the appropriate chat queue.

Anonymous chat record producer

The form used to request information from a guest user is a configurable record producer based on the Consumer Interaction table (sn_customerservice_customer_interaction), which is a new table in the Istanbul release. When a guest user submits the form, the information provided is stored as a record in the Customer Interaction table. This record is used for routing the chat request.

The default anonymous chat record producer, **What can we help you with?**, is located at **Service Catalog** > **Catalog Definition** > **Record Producers**. This is a public record producer. You can modify this record producer or create your own. If you choose to create your own, see Section 3 in the Making a record producer and catalog item public on a CMS page [KB0551300] article. You must also set the *glide.sc.use_user_criteria* property to **false**.

For more information, see Record Producer.

Anonymous chat routing

Information provided by the guest user assists with routing and also provides the context of the request to the consumer service agent. The chat request is routed to the appropriate agent queue based on the type of issue selected. The routing for anonymous chat requests uses matching rules. Create one matching rule for each queue and tie a chat request to a chat queue based on the selected issue type. Matching rules for anonymous chat are based on the Customer Interaction table.

The following matching rules are provided:

- Anonymous Connect - Billing Support
- Anonymous Connect - Order Support
- Anonymous Connect - Product Support

These rules are based on the selections in the **Issue Type** field on the default anonymous chat record producer.

Anonymous chat properties

There are two properties related to the anonymous chat feature. Set these properties to limit the number of chat requests created by guest users.

Properties of Anonymous chat

Property	Description
connect.support.max_guest_sessions_per_hour	Limit maximum number of guest conversations created in the last hour. • Type: integer • Default value: 200

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Properties of Anonymous chat (continued)

Property	Description
	• Location: **Collaborate** > **Connect Support** > **Support Administration** > **Properties**
connect.support.guest_sessions_rate_limit_reached_message	Message shown to user when rate limit for guest conversations is breached. • Type: string • Default value: Guest Chat is currently not available, please retry later. • Location: **Collaborate** > **Connect Support** > **Support Administration** > **Properties**

Related topics

Record Producer

Connect Support

Routing and assigning customer service cases

Modify the anonymous chat record producer

Modify the default anonymous chat record producer to gather the desired information from guest users.

Before you begin

Role required: admin

About this task

This record producer requests information from a guest user on the Consumer Service Portal and stores the information as a record in the Consumer Interaction table (sn_customerservice_customer_interaction). The record is then used for routing the chat request.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definition** > **Record Producers**.
2. Click **What can we help you with?**.
3. Modify the record producer as necessary, including the variables in the **Variables** related list. For more information, see Create a record producer to log incidents.
4. Click **Update**.

Create a matching rule for anonymous chat

Create one matching rule for each agent queue.

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Before you begin
Role required: admin

About this task
A chat request is tied to a chat queue based on the selected issue type.

Procedure
1. Navigate to **All** > **Routing and Assignment** > **Matching Rules**.
2. Click **New**.
3. Enter a **Name** for the matching rule.
4. In the **Table** field, select **Customer Interaction**.
5. In the **Conditions** field, use the condition builder to create the following conditions.

Create conditions with condition builder

Field	Operator	Value
Channel	is	Chat
Category	is	Select one of the categories created for anonymous users to define an issue on the record producer: ○ Product Issue ○ Billing Issue ○ Order Issue

6. Click **Submit**.

Configure anonymous chat properties

Users with the system administrator role can set properties to limit the number of chat requests created by guest users.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Collaborate** > **Connect Support** > **Support Administration** > **Properties**.
2. Set the following properties.

Option	Description
Limit maximum number of guest con versations created in the last hour. (*connect.support.max_guest_sessions_per_hour*)	Limits the number of guest chat requests that can be created in a one-hour time frame. The default value is 200.
Message shown to user when rate lim it for guest conversations is breached. (*connect.support.guest_sessions_rate_limit_reached_message*)	The message that is displayed on the Con sumer Service Portal when the limit on the

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Option	Description
	number of guest chat requests has been reached.

3. Click **Save**.

Respond to an anonymous chat request

Select a chat request from the chat queue and respond to a guest user's question or comment.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

Procedure

1. Navigate to **All** > **Collaborate** > **Connect Chat**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon.
   The support tab displays **Queues** to which you belong. It also displays your open support conversations under **Cases**. When a consumer starts a support conversation or an agent transfers a conversation to a queue, any agent who belongs to the associated queue has the option to accept the conversation. An agent can also request to transfer a conversation directly to you.
3. Accept a conversation in one of the following ways.
   - Accept a conversation from a queue
   - Accept a transfer request
4. Respond to the guest user and help resolve the issue.
   By default, your messages are added to the conversation record as comments and are visible to the user.

What to do next

If necessary, you can create a consumer record for a guest user and create a consumer service case from the conversation to track the issue. You can also transfer the conversation to a different agent or queue, or escalate the conversation to a higher priority queue. For more information, see Connect Support.

Customer Service Management Workflow Studio actions

Use Workflow Studio actions as building blocks to create Customer Service Management business processes.

CSM Workflow Studio actions

Action	Description
Get Case	Retrieve a case record using the case number. If multiple records are found, only the first record is returned.
Create Case	Create a case using one or more attributes. This action mimics the structure of the Case table (sn_customerservice_case) and exposes all of the fields present on the Case table.

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CSM Workflow Studio actions (continued)

Action	Description
Create Quick Case	Create a case using the customer, description, channel, priority, and category attributes.
Create Task on Case	Create a case task and optionally associate it with a case.
Update Case	Update a case by providing the case reference and the fields that you want to update.
Assign Case	Assign a case using matching rules. To use this action, you must first define the matching rules that match cases with resources (assignment groups, agents).
Escalate Case	Request case escalation. This action does not automatically approve escalation. Approval is based on the selected escalation template.
Escalate Account	Request account escalation. This action does not automatically approve escalation. Approval is based on the selected escalation template.
Add Work Note to Task	Add a work note to a task or to task extended objects (for example, a case or case task).
Add Comment to Task	Add a comment to a task or to task extended objects (for example, a case or case task).

Related topics

Flow Designer

Action Designer

Domain separation and Customer Service Management

Domain separation is supported in Customer Service Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

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.

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

Overview

Domain separation for Customer Service Management is designed for:

- **Customers using the application in a domain-separated environment or in a hybrid environment**. With domain separation, a customer can grant access to end users (contacts or consumers) to other entities in addition to customer service cases. For example, contacts or consumers can access problems, changes, or projects. Administrators can synchronize the CSM account model with the domain structure and maintain data separation for entities that don't have account-based data separation enabled.
- **Managed service providers (MSPs) using the application to provide customer support**. In this scenario, an MSP can provide support to multiple customers, where domains are necessary to contain all relevant customer data and processes. For example, an MSP providing support to customers related to billing questions, contract renewals, or other non-service operations.
- **Managed service providers offering the application as a service that customers can provide to their customers**. In this scenario, an MSP can offer Customer Service Management as a service to customers who, in turn, use the application to support their end customers. This scenario requires additional configuration due to domain support for some of the core entities in the platform such as Product Model.

How domain separation works in Customer Service Management

Domain separation for Customer Service Management aligns each customer account to one domain. To use domain separation with the application, all customer accounts must be assigned to a domain.

The customer account is the main entity within Customer Service Management. All entities related to the account, such as contacts and cases, are created in the same domain as the account. This rule also applies for all entities on customer service cases, including addresses, assets, and contacts.

When a new account is created, a domain of the same name is also created and assigned to the account. All related entities for an account, such as contacts and cases, must reside in the same domain. When a related entity for a domain-separated account is created, the entity is assigned to the account domain.

Setting up domain separation for Customer Service Management

Domain separation for Customer Service Management requires the domain separation plugin. Contact ServiceNow to activate domain separation.

Domain separation for Customer Service Management also requires enabling the **csm_auto_account_domain_generation** property. This property is installed with Customer Service Management and is available only after the domain separation plugin is active. Contact ServiceNow to enable this property.

When the **csm_auto_account_domain_generation** property is enabled, the Customer Service Management application automatically creates a domain of the same name when a new account is created.

> **Note:** Enabling the **csm_auto_account_domain_generation** property doesn't add domains for existing accounts. It only creates domains for newly created accounts. Adding domains for existing accounts requires a migration script. You can request for the migration script from the ServiceNow Professional Services team.

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Changes to Customer Service Management tables

Domain separation for Customer Service Management adds the **Domain** and **Domain Path** fields to the Account [customer_account] table. These fields aren't exposed by default. Customers can customize lists and forms to view these fields.

Account domains and related entities

When creating related entities for an account, the domain for the related entities is set to the account domain. Related entities include:

- Contacts
- Cases
- Assets
- Contracts
- Entitlements
- Addresses
- Social profiles
- Escalations
- Sold Products
- Installed Products
- Install Base Items
- Affected Install Base Items
- Sold Product Covered

Changing the domain for an account also changes the domain for all the account's related entities.

Domain visibility for customer service agents and managers

Users with the customer service agent (sn_customerservice_agent) and customer service manager (sn_customerservice_manager) roles must be manually assigned to the **TOP/MSP/Default** domain. Agents and managers can't see case or account details until they're assigned to the **TOP** domain.

Domain separation for case and account escalation

Escalation template records and escalation severity records are domain separated. By default, these records reside in the global domain. Users can configure the Escalation Template and Escalation Severity forms to display the **Domain** field and set the domain as needed.

When an escalation record is created from a case or account, it's created in the account domain.

Domain separation for ribbon configuration, Lookup and Verify configuration, and Special Handling Notes

Ribbon and Lookup Verify configurations and Special Handling Notes support domain separation as process-separated tables.

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When inserting or updating a record for process-separated tables, the picker domain scope takes precedence by design with the Overrides [sys_override] field on process-separated tables. For more information, see Process administration.

Related topics

Domain separation for service providers

Domain separation and entity relationships

With domain separation in Customer Service Management, you can further control visibility and access to data by using contact, partner, and parent-child relationships.

Partner-customer account relationships

In partner-customer account relationships, the partner account can see data in the customer account's domain. When setting up an account relationship, the domain visibility direction is **From > To**. The account in the **From** field contains the domain of the account in the **To** field.

When a partner admin creates a case for a customer account, the case is created in the customer account's domain so that all relevant parties can access the case.

In partner-customer account relationships where the customer account has child relationships, the partner admin can create a case for the customer account but not for the child accounts. The partner admin can only create cases for the account with which the relationship has been established.

Contact relationships

In contact relationships, the contact included in the relationship can see data for the specified account domain.

Parent-child relationships

The account hierarchy feature creates a parent-child relationship between accounts. This relationship is defined by selecting the parent in the **Parent Account** field on the Account form for the child account. Domain hierarchy is also achieved using the **Parent Account** field. In parent-child account relationships, parent domains can see data in child domains.

To provide access from the child account to the parent account, you need to set domain visibility. Navigate to the child account and set visibility in the Visibility Domains related list (sys_user_visibility) by connecting the user to the domain.

Knowledge product entitlements

The Knowledge Product Entitlements application enables administrators to designate the knowledge bases and knowledge articles that customers can view from the Customer Service Portal.

Limit access on the Customer Service Portal to the following:

- The knowledge bases and articles for the products that a customer's company has purchased.
- The knowledge bases and articles for which a customer's company has entitlements.

The Knowledge Product Entitlements plugin (com.snc.kb_product_entitlements) must be activated to use this application. Installing this plugin adds the **Related Products** field to the Knowledge Base form and to the Knowledge form. The knowledge information available on the customer portal is limited to the products selected in this field.

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Additional controls are available by enabling properties that allow you to:

- Limit access to knowledge bases based on product entitlements.
- Enable access if no products are specified in the **Related Products** fields.

Add a related product to a knowledge base or knowledge article

Add a product to a knowledge base or knowledge article using the **Related Products** field on the corresponding form.

Before you begin

Role required: admin

About this task

To access knowledge bases and articles associated with a product, a user must have read or contribute access and have the product included in the user's account as an asset. For more information about assets, see Configure assets.

Procedure

1. To add a related product to a knowledge base:
   a. Navigate to **Knowledge** > **Administration** > **Knowledge Bases**.
   b. Select the desired knowledge base.
   c. Add one or more products in the **Related Products** field.
   d. Select **Update**.
2. To add a related product to a knowledge article:
   a. Navigate to **Knowledge** > **Articles** > **All**.
   b. Select the desired knowledge article.
   c. Add one or more products in the **Affected Products** related list.
   d. Select **Update**.

Set knowledge product entitlement properties

Set various properties to allow customers to access knowledge bases and knowledge articles on the Customer Service Portal.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Knowledge Product Entitlements** > **Properties**.
2. Set the following properties, as needed.

Option	Description
Enable access control of Knowledge Bases based on product entitlements	If enabled, customers can access all of the knowledge bases related to the products for which they have entitlements.
Allow access to Knowledge Bases with empty related_products	If enabled, customers can access all knowledge bases even if no products have been specified in the **Related Products** field on the Knowledge Base form.

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Option	Description
Enable access control of Knowledge Articles based on product entitlements	If enabled, customers can access all of the knowledge articles related to the products for which they have entitlements.
Allow access to Knowledge Articles with empty related_products	If enabled, customers can access all knowledge articles even if no products have been specified in the **Related Products** field on the Knowledge form.

3. Click **Save**.

Limit knowledge base access to internal users

Limit access to the information in a knowledge base to internal users.

Before you begin

Role required: admin

About this task

The articles in a knowledge base are available to both internal users, such as customer service agents, and to external users (customers and partners). If the articles in a knowledge base are intended for internal users only, the system administrator can restrict access by customizing the knowledge base form.

Procedure

1. Navigate to **All** > **Knowledge** > **Administration** > **Knowledge Bases**.
2. Click the desired knowledge base.
3. Right-click the form header and select **Configure** > **Related Lists**.
4. Select **Cannot Contribute** from the Available column and move it to the Selected column.
5. Click **Save**.
6. On the selected knowledge base form, click the **Cannot Contribute** related list.
7. Click **Edit**.
8. Click **All Customer Contacts** in the left column and move it to the right column.
9. Click **Save**.

Administer Customer Contracts and Entitlements

Set up the Customer Contracts and Entitlements application to enable maintaining service contracts, contract lines, and entitlements.

Administration tasks for Customer Contracts and Entitlements

Task	Description
Add related lists to sold products and install base items	Add related lists to the Sold Product and Install Base Item forms to see the associated contracts, contract line items, and entitlements.

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Administration tasks for Customer Contracts and Entitlements (continued)

Task	Description
Add a service contract related list	Add related lists to the Account, Consumer, and Household forms to see the associated contracts.

Add related lists to sold products and install base items

Add Customer Contracts and Entitlements entities' related lists on the sold products and install base Items pages.

Before you begin

Role required: admin

About this task

To see the contracts, contract line items, and entitlements associated with a sold product, or an Install base Item on the same page, you must add the respective related lists manually on the form.

Note: You can only add the related lists on the platform interface. The same settings are implemented on the CRM Workspace.

Procedure

1. Add related lists to sold products and install base items.

Add to	Procedure
Sold Product	**a.** Navigate to **All** > **Customer Service** > **Products** > **Sold Products**. **b.** Select the sold product.
Install Base Item	**a.** Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**. **b.** Select the install base item.

2. From the Additional actions menu, select **Configure** > **Related Lists**.
3. Select the following related lists from the Available menu and move them to the **Selected** menu using the **Add** option (forward arrow):
   - Service Contracts
   - Service Contract Lines
   - Service Entitlements
4. Select **Save**.
   The related lists are added on the Sold Product or Install Base Item form.

Add a service contract related list

Add a service contract related list to the Accounts, Consumers, and Households pages.

Before you begin

Role required: manager

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About this task

To see the contracts associated with Accounts, Consumers, and Households, respectively, on the same page, you must add the related list manually on the form.

Note: You can only add the related list on the platform interface in the Workspace view. The same setting is implemented on the CRM Workspace.

Procedure

1. Add related lists to sold products and install base items.

Add to	Procedure
Accounts	**a.** Navigate to **All** > **Customer Service** > **Customer** > **Accounts**. **b.** Select the account.
Consumers	**a.** Navigate to **All** > **Customer Service** > **Customer** > **Consumers**. **b.** Select the consumer.
Households	**a.** Navigate to **All** > **Customer Service** > **Products** > **Households**. **b.** Select the household.

2. From the Additional actions menu, select **Configure** > **Related Lists**.
3. Select **Workspace** in the **View name** field.
4. Select the **Service Contracts** from the **Available** menu and move to the **Selected** menu using the **Add** option (forward arrow):
5. Select **Save**.
   The related lists are added on the Sold Product or Install Base Item form.

Integrating Customer Service Management with other applications

Extend the capabilities of Customer Service Management and connect with other departments to assist with case resolution by integrating with other applications.

Customer Service Management provides integrations with the applications listed in the following table:

Customer Service Management Application Integrations

Step	Description
Integrating withIT Service Management	Integrate with Incident, Problem, Change, and Request Management applications.
Integrating with Service Portfolio Management	Get visibility into sold products and their associated service offerings with this integration.

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Customer Service Management Application Integrations (continued)

Step	Description
Integrating with Continual Improvement Management	Get help with setting goals, organizing effort, and completing tasks.
	Create and view all FSM work orders and appointments as a Customer Service Management user.
Integrating with IT Operations Management	Create cases proactively from alerts and track the corresponding install base items affected by the alert.
Integrating with Customer Project Management	Use this integration to create projects and project tasks for your customer accounts.
Integrating with Financial Management	Allocate, track, and get report on expenses in your organization using this integration.
Integrating with Adobe Experience Manager	Deliver a pre-integrated web experience built on AEM by embedding Customer Service Management and Knowledge Management capabilities.
Integrating with Computer Telephony Integration (CTI)	Enable the Customer Service application to support inbound and outbound telephone calls with this integration.
Integrating with Microsoft Outlook	Manage contacts and cases from within Microsoft Outlook using this integration.
Integrating with Safe Workplace applications	Enable contacts or consumers to safely enter locations and comply with health and safety policies after emergencies and pandemics
Integrating with consumer messaging apps	Let customers use their choice of messaging apps to message anytime to your company's account.
Integrating with Process Mining	Analyze processes relevant to your KPIs, and identify bottlenecks associated with customer service cases.
Integrating with contact centers	Integrate with your contact center as a service (CCaaS) provider.

Integrating withIT Service Management

Integrate Customer Service Management with IT Service Management that includes the Incident, Problem, Change, and Request Management applications. With this integration, users can create request, incident, problem, and change records from customer service cases and external users can view these records from the Customer and Consumer Service Portals.

Integration with the Service Management applications provides the following functionality for internal and external users.

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User roles and tasks

User	Tasks
Agents	• Create incident, problem, change, and request records from open cases. • Associate existing incident, problem, change, and request records with cases • Remove associated records from cases.
Agents and managers	• View cases with Service Management -related indicators on the Customer Service dashboards. • View updates to records associated with a case. These updates automatically update the case work notes. • Use the updates to records associated with a case to communicate with customers.
External users	• View problem, change, and request records associated with cases from the Customer and Consumer Service Portals. • Create requests from the Customer and Consumer Service Portals. • Approve changes and requests from the Customer Service Portal. • View Known Error articles for a problem related to a case.

Integration with Incident Management

Integration with the Incident Management application enables customer service agents to create incident records from cases or associate existing incident records to cases. For more information, see CSM integration with Incident Management.

Integration with Problem Management

Integration with the Problem Management application enables customer service agents to create problem records from cases or associate existing problem records to cases. For more information, see CSM integration with Problem Management.

Integration with Change Management

Integration with the Change Management application enables customer service agents to create change records from cases or associate existing change records to cases. For more information, see CSM integration with Change Management.

Integration with Request Management

Integration with the Request Management application enables customer service agents to create request records from cases or associate existing request records to cases. It also enables customers to create requests from the Customer and Consumer Service Portals. For more information, see CSM integration with Request Management.

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CSM integration with IT Service Management overview

Customer Service Management provides an integration with the Incident, Problem, Change, and Request Management applications.

Plugins

Customer Service Management integration with Service Management requires the following plugins:

- Customer Service with Service Management plugin (com.sn_cs_sm)
- Customer Service with Request Management plugin (com.sn_cs_sm_request)

For additional information, see Integrate with Service Management.

Roles

The Service Management integration plugins do not add any roles to the customer service agent (sn_customerservice_agent) role. To enable the Service Management integration features, you must assign the CSM/ITSM integration roles included with the Incident Management application to the agents who need this capability. For more information, see Assign CSM/ITSM integration roles.

Creating records for a case

The Service Management integration plugins add the following menu items to the Additional Actions menu on the Case form. Agents can use these menu items to create records for a case.

- Create Incident
- Create Problem
- Create Request
- Create Normal Change
- Create Standard Change

Note: Agents can create or associate one incident, problem, or change record with a case. After a record is created or associated with a case, the corresponding menu items are no longer available on the Additional Actions menu.

For more information, see Create incident, problem, change, and request records from cases.

Viewing incident, problem, and change records related to a case

The Service Management integration plugins add the Related Records form section to the Case form. This section includes the following fields:

- Incident
- Problem
- Change Request
- Caused by Change

When an incident, problem, or change record is created from a case, or an existing record is associated with a case, the record number is added to the corresponding field in the Related Records form section.

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Viewing requests related to a case

When a request is created from a case, or an existing request is associated with a case, the request record number is added to the **Requests** related list on the Case form.

Note: Agents can create multiple requests for a case.

Related records list widget for external customers

When viewing a case on the Customer or Consumer Service Portal, external users can see other records that are associated with the case in the Related Records list widget. These records can include problems, changes, and requests. Users can click a record in the Related Records widget to view additional details in a pop-up window.

Note: If a case does not have any related records, the Related Records widget does not appear on the case view page.

From the Customer and Consumer Service Portals, users can view lists of cases and requests by doing one of the following:

- Clicking **My Lists** in the portal menu header.
- Clicking **Requests** > **All Requests** in the portal menu header.

For more information, see View case records from the Customer and Consumer Service Portals.

Using case resolution codes

The Service Management integration plugins provide the following case resolution codes.

Agents can select these codes from the **Resolution code** field in the **Resolution Information** section on the Case form.

- Solved – Fixed by closing related PRB
- Solved – Workaround provided based on open PRB
- Solved – Fixed by closing related Change Request
- Solved – Fixed by closing related Incident
- Solved – Related Request is Closed Complete

IT Service Management integration and Major Issue Management

The major issue management feature works with the CSM integration with IT Service Management as follows:

- A major issue manager with the itil role can create incident, problem, change, and request records from a major case.
- When a major case candidate with an associated record is accepted as a major case:
  - A new major case is created and the candidate becomes a child of the major case.
  - The related record information is copied from the child case to the major case.
  - For the child case, the options to create related records are removed from the Additional Actions menu.
  - For the child case, the fields in the Related Records form section are read-only.
  - Updates to the related records appear in the work notes of the major case. These updates are added to the child case when fields are synchronized from the major case to the child case.

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- A major case and child cases can have different types of related records. This can happen when an existing case with a related incident, problem, change, or request record is added as a child of a major case. When updates are made to the record related to the child case, information about the update is added to the child case work notes.
- If a major case and child cases have the same related record, updates to that record are added to the major case work notes. These notes are copied from the major case to the child cases if:
  - The **sn_customerservice.case_fields_to_sync** property is enabled.
  - The field in the in the Related Records form section is added to the **sn_customerservice.case_fields_to_sync** property.
- If a major case and child cases have different related records of the same type, updates to the records are copied only to the respective cases.

CSM integration with Incident Management

Integration with the Incident Management application enables customer service agents to create incident records from cases or associate existing incident records to cases.

With this integration, customer service agents can:

- Create an incident from a case.
- Associate an existing open incident to a case.
- Remove an associated incident from a case.
- View the following in the case work notes:
  - Incident state changes.
  - Additional comments added to the incident record.

Note: A case can be associated with one incident. If a case is already associated with an incident, the **Create Incident** item does not appear on the Additional Actions menu.

Plugins

Integration with Incident Management requires the Customer Service with Service Management plugin (com.sn_cs_sm).

Roles

The following roles enable customer service agents to view and create incidents for customer service cases.

- sn_incident_read
- sn_incident_write

For more information, see Assign CSM/ITSM integration roles.

Determining the incident priority, impact, and urgency

When creating an incident from a case:

- If the incident data lookup is active, the system copies the case priority to the incident priority and calculates the incident impact and urgency based on the Priority Data Lookup [dl_u_priority] table.
- If the Incident data lookup is inactive, the system uses these default settings for the incident fields:

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- Priority: 5 - Planning
- Impact: 3 - Low
- Urgency: 3 - Low

Synchronizing data between the incident and the case

Work notes are synchronized from the incident to the case when:

- The incident state changes. If the incident state changes to On Hold, the hold reason is copied to the case work notes.
- The incident is resolved or closed. The incident resolution notes and resolution code are copied to the case work notes.
- Additional comments are added to the incident.

Note: When an incident is created or an existing incident is associated with a case, notification from the incident is suppressed if the caller is an external user (contact or consumer).

CSM integration with Problem Management

Integration with the Problem Management application enables customer service agents to create problem records from cases or associate existing problem records to cases.

With this integration, customer service agents can:

- Create a problem from a case.
- Associate an existing open problem to a case.
- Remove an associated problem from a case.
- View problem state changes in the case work notes.

Note: A case can be associated with one problem. If a case is already associated with a problem, the **Create Problem** item doesn't appear on the Additional Actions menu.

Plugins

Integration with Problem Management requires the Customer Service with Service Management plugin (com.sn_cs_sm).

Roles

The following roles enable customer service agents to view and create problems for customer service cases.

- sn_problem_read
- sn_problem_write

For more information, see Assign CSM/ITSM integration roles.

Synchronizing data between the problem and the case

With the Problem Management Best Practice – Madrid plugin activated, customer service agents can view the following information in the case work notes:

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- When the state of a related problem is updated, the text of the work note includes a link to the problem.
- When **Communicate Workaround** is selected from the related problem, the workaround text is copied to the case work notes.
- When **Communicate Fix** is selected from the related problem, the fix text is copied to the case work notes.
- When the problem is resolved or closed with a specific resolution code:
  - State is Closed and Resolution Code is Cancelled. The Cancelled Reason text is copied to the case work notes.
  - State is Closed and Resolution Code is Risk Accepted, the Cause notes, Risk accepted reason, and Fix notes are copied to the case work notes.
  - State is Resolved and Resolution Code is Fix Applied, the Cause notes, and Fix notes are copied to the case work notes.
  - State is Closed and the Resolution Code is Fix Applied, the Cause notes, and Fix notes are copied to the case work notes.

With the Problem Management Best Practice - Madrid - Knowledge Integration plugin activated, the customer service agent can view information in the case work notes when a Known Error Article is created for or associated with a related problem. The work note includes a link to the article.

CSM integration with Change Management

Integration with the Change Management application enables customer service agents to create change records from cases or associate existing change records to cases.

With this integration, customer service agents can perform the following tasks:

- Create a change from a case.
- Associate an existing open change to a case.
- Remove an associated change from a case.
- View the following information in the case work notes:
  - State changes for the change record.
  - Additional comments added to the change record.

Note: A case can be associated with one change. If a case is already associated with a change, the **Create Normal Change** and **Create Standard Change** options do not appear on the Additional Actions menu.

Plugins

Integration with Change Management requires the Customer Service with Service Management plugin (com.sn_cs_sm).

Roles

The following roles enable customer service agents to view and create changes for customer service cases.

- sn_change_read
- sn_change_write

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For more information, see Assign CSM/ITSM integration roles.

Synchronizing data between the change and the case

Work notes are synchronized from the change to the case when:

- The change state or change type is updated.
- Additional comments are added to the change record.
- When the change associated with a case is put on hold, the work notes are updated with the hold reason.
- When a hold on the change associated with a case is removed, the work notes on the case are updated.
- When the change is resolved or closed.

Change form related lists

Integration with the Change Management application adds the following related lists to the Change form:

- Cases Fixed by Change
- Cases Caused by Change

Standard change record producer behavior

When a record producer for a standard change or normal change is created and exposed to customer service agents from the Customer or Consumer Service Portals:

- The record producer only appears in the portal after clicking the **Create Request** UI action.
- The record producer does not appear as part of Standard Change catalog items.
- If the agent chooses to create a Standard Change from the normal record producer, the Standard Change is created but the change record is not linked with the case.

CSM integration with Request Management

Integration with the Request ManagementCSM application enables customer service agents to create request records from cases or associate existing request records to cases. It also enables customers to create requests from the Customer and Consumer Service Portals.

With this integration, customer service agents can:

- Create one or more requests on behalf of a customer from an existing customer service case.
- Associate an existing request to a case.
- Remove an associated request from a case.
- View a list of requests associated with a case in the **Requests** related list.
- View the following in the case work notes:
  - Request state changes.
  - Additional comments added to the request item record.

Note: When creating a request from a case, if the agent chooses a catalog item that is using cart v1 (the use_sc_layout field is not checked), the case is not set as the parent of the request.

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Plugins

Integration with Request Management requires the Customer Service with Request Management plugin (com.sn_cs_sm_request).

Roles

The following roles enable customer service agents to view and create requests for customer service cases.

- sn_request_read
- sn_request_write

For more information, see Assign CSM/ITSM integration roles.

Enabling the Create Request UI action for case types

To enable the **Create Request** UI action for a case type table that extends the Case [sn_customerservice_case] table, add an entry for the case type to the Request Parent Mapping [request_parent_mapping] table. For more information, see Enable the Create Request UI action for case types.

Synchronizing data between the request and the case

Work notes are synchronized from the request to the case when:

- The request state changes.
- The request is closed.
- Additional comments are added to the request.

Note: When a request is closed, the case does not automatically move to solution proposed.

Communicating with the requester

The task fulfiller can communicate with the requester if additional information is needed. Use the **Additional comments** field on the request to communicate with the requester through the case. Information added to the **Additional comments** field on the request is synchronized to the case work notes.

If the case is the parent of the request, notifications to the requester are suppressed when additional comments are added to the request by the fulfiller.

Related topics

Create a request on behalf of a customer or consumer

Create a request record from a case

Create a request from the Customer and Consumer Service Portals

Service catalog integration with the Customer and Consumer Service Portals

Users with the customer administrator role (sn_customerservice.customer_admin) can associate a portal with a service catalog.

The following catalog pages and widgets are provided as part of the Customer Service with Request Management integration.

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For more information, see Associate a portal with a catalog.

CSM Catalog page

The CSM Catalog page is the display page for catalog items on the Customer and Consumer Service Portals. This page serves as the landing page for any service catalog item exposed on a CSM portal. All request items exposed on the CSM portals are either service catalog items or service catalog record producers. Navigate to **Service Portal** > **Pages** to view this page.

- Page ID: csm_sc_cat_item
- Update name: sp_page_7ea80b123bb31300bfe04d72f3efc4b7
- Available to roles: snc_internal, snc_external

CSM Catalog Item widget

This widget handles the redirection logic on submission of the catalog item and embeds the default catalog item widget. This widget listens to event **$sp.sc_cat_item.submitted**. On submission of a catalog item, it handles the portal redirection logic based on the page_id and the catalog portal URL. When there's no parent set in the Requests (sc_request) table, the URL is redirected to the default service portal ticket page. If a record producer has a redirect URL, this widget uses the redirect URL from the record producer instead of redirecting to the ticket page.

- Widget ID: csm-sc-cat-item
- Update name: sp_widget_ec837c713bbb1300bfe04d72f3efc4d1
- Available to roles: snc_internal, snc_external

Page route map

It's important to set up a page route map for any new Service Portals to handle the redirection to the Case ticket page. The redirection is based on the logic described in the CSM Catalog Item widget.

- CSM Catalog item page route map: For the Customer Service Portal, this page route map routes the URL redirect from the sc_cat_item page to the csm_sc_cat_item page.
- CSP Catalog item page route map: For the Consumer Service Portal, this page route map routes the URL redirect from the sc_cat_item page to the csm_sc_cat_item page.

Portal settings for catalog items

Once the catalog items are defined, visibility of the **Submit**/**Add to Cart** button can be controlled by navigating to **Service Catalog** > **Catalog Definitions** > **Maintain Items**, selecting the desired item, and enabling or disabling the fields in the Portal Settings form section.

Maintain Items Portal settings fields

Field	Description
Request method	Select Order, Request, or Submit as the type of catalog item.
Hide 'Add to Cart'	Enable if the **Add to Cart** button should be disabled for the catalog item.

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Maintain Items Portal settings fields (continued)

Field	Description
	Note: The **Add to Cart** button isn't currently supported on the Customer Service Portal or the Consumer Service Portal.
Hide Quantity	Enable if the **Quantity** of the catalog item should be hidden.
Hide Delivery Time	Enable if the **Delivery Time** of the catalog item should be hidden.
Hide 'Add to Wish List'	Enable if the **Add to Wish List** button for the catalog item should be hidden.
Hide Attachment	Enable if the attachment of the catalog item should be hidden.

Extension points for CSM integration with IT Service Management

Use the extension points available with CSM integration with IT Service Management to extend the functionality of your application.

Extension points enable you to extend the functionality of an application and integrate customizations without altering the application code. Extension points are stored in the Extension Point [sys_extension_point] table.

Using an extension point to map the Incident field

Customers can create the logic for mapping the **Incident** field by using the `sn_cs_sm.CSMIncidentIntegrations` extension point.

For more information about mapping fields, see the How to map or copy field values from Case to Incident when using CSM Integration with Incident Management [KB0817494] article in the HI Knowledge Base.

Using an extension point to map the Problem field

Customers can create the logic for mapping the **Problem** field by using the `sn_cs_sm.CSMProblemIntegrations` extension point.

Using an extension point to map the Change Request field

The Customer Service with Service Management plugin (com.sn_cs_sm) adds the `CSMChangeIntegrations` extension point, which exposes generic APIs that are used for Case to Change integration.

Note: The `CSMChangeIntegrations` extension point is read only. To modify this extension point, contact ServiceNow Customer Support.

The Customer Service with Service Management plugin also adds an implementation of the `CSMChangeIntegrations` extension point. This implementation can be modified and deactivated. However, this isn't recommended.

If it's necessary to modify the APIs within the `CSMChangeIntegrations` extension point, the system administrator can:

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- Create an implementation of an extension point.
- Make the necessary changes in the implementation.
- Update the order of the implementation to a lower number. The system executes the implementation with the lowest order number.

Note: API names used in the implementation must remain the same, otherwise the extension point won't be able to identify the implementation, causing an error.

For example, the *CSMChangeIntegrations* extension point includes the following *copyFieldsFromCaseToChange* API for creating a change from a case record.

```
copyFieldsFromCaseToChange: function(changeGr, caseGr) {
  changeGr.short_description = caseGr.short_description;
  changeGr.cmdb_ci = caseGr.cmdb_ci;
  changeGr.impact = caseGr.impact;
  changeGr.urgency = caseGr.urgency;
  changeGr.priority = caseGr.priority;
  changeGr.company = caseGr.account;
  changeGr.sys_domain = caseGr.sys_domain;
},
```

To modify this API, create an implementation of the extension point and make the desired changes without changing the API name.

```
copyFieldsFromCaseToChange: function(changeGr, caseGr) {
  changeGr.abcd = caseGr.abcd;
},
```

Using an extension point to map the Request field

Customers can create the logic for mapping the **Request** field by using the *sn_cs_sm_request.CSMRequestIntegrations* extension point.

Using an extension point to approve changes and requests from the Customer Service Portal

This feature includes an extension point that can be used to configure approval entities: **global.CSMApprovalsManagement**. Use this extension point to extend the approval functionality to any other entity, such as a problem.

Related topics

Using extension points to extend application functionality

Setting up CSM integration with IT Service Management

Integrate Customer Service Management with IT Service Management that includes the Request, Incident, Problem, and Change Management applications. With this integration, users can create request, incident, problem, and change records from customer service cases. External users can view these records from the Customer and Consumer Service Portals.

IT Service Management configuration tasks

Task	Description
Integrate with IT Service Management using Guided Setup	Use the Guided Setup to integrate CSM with IT Service Management.

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IT Service Management configuration tasks (continued)

Task	Description
Install Customer Service Management with Service Management	Activate the CSM with Service Management plugin (com.sn_cs_sm) to enable the integration the following applications: • Incident Management • Problem Management • Change Management
Install Customer Service Management with Request Management	Activate the CSM with Request Management plugin (com.sn_cs_sm_request) to use the integration with the Request Management application.
Assigning CSM/ITSM integration roles	Assign the required roles to the customer service agents and managers who will be creating the request, incident, problem, and change records from customer service cases.
Enable external customers to access problem, change, and request records	Assign access controls (ACLs) to the external user roles to provide visibility to case-related request, problem, and change records from the Customer and Consumer Service Portals.
Enable external customers to create requests	Assign roles to external customers which enable them to create requests.

Enable external customers to approve requests and changes	Enable external customers to approve changes and requests:
	• Add external users to approval groups or assign roles for approval users.
	• Add the necessary ACLs to the snc_external role for the following table:
	  ○ Change Request (change_request)
	  ○ Request (sc_request)
	  ○ Request Item (sc_req_item)

Enable the Create Request UI action for case types	Enable the **Create Request** UI action for case type tables that extend the Case [sn_customerservice_case] table.

Integrate with IT Service Management using Guided Setup

Use the Guided Setup to integrate Customer Service Management with the Request, Incident, Problem, and Change Management applications.

Before you begin

Role required: csm_guided_setup_user or admin

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About this task

To configure the integration with the Request, Incident, Problem, and Change Management applications, use the Customer Service guided setup. The guided setup takes you through the setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, click **Get Started**.
3. In the Integration with Service Management category, click **Get Started**.
   The Integration with Service Management page opens with a list of tasks to activate plugins and assign roles.
4. To perform a task, click **Configure**.
   This button opens the page in your instance where the configuration is completed.

Install Customer Service Management with Service Management

You can install the Customer Service with Service Management application (com.sn_cs_sm) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Customer Service Management with Service Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Procedure

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

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.

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

6. Select **Install**.

Install Customer Service Management with Request Management

You can install the Customer Service with Request Management application (com.sn_cs_sm_request) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Customer Service Management with Request Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Procedure

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

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

   A list of the versions available to you are displayed.

3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Assigning CSM/ITSM integration roles

To enable the Service Management integration features, assign the CSM/ITSM integration roles that are included with the Incident Management application.

The Service Management integration plugins do not add any roles to the customer service agent role (sn_customerservice_agent). To enable the Service Management integration features, you must assign the CSM/ITSM integration roles included with the Incident Management application.

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- Assign roles to agents using guided setup. For more information, see Integrate with IT Service Management using Guided Setup.
- Assign roles to agents using the *ServiceNow AI Platform* user administration feature. For more information, see Assign a role to a user.

CSM/ITSM integration roles

Several types of roles are available with CSM integration with ITSM.

CSM/ITSM integration roles for agents

These roles enable customer service agents to view and create incident, problem, change, and request records for customer service cases.

CSM/ITSM integration roles for agents

Role title [name]	Description	Contains roles
sn_incident_read	Customer service agents with this role can: • View information about an incident record associated with a customer service case. • Associate an existing incident record with a customer service case. • Remove an incident record associated with a customer service case.	• dependency_views • workspace_agent • view_changer • sn_comm_management.comm_plan_viewer • cmdb_read • cmdb_query_builder_read
sn_incident_write	Customer service agents with this role can: • Create an incident record for a customer services case. • Associate an existing incident record with a customer service case. • Remove an incident record associated with a customer service case.	sn_incident_read
sn_problem_read	Customer service agents with this role can: • View information about a problem record associated with a customer service case.	• dependency_views • workspace_agent • view_changer • cmdb_read • cmdb_query_builder_read

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CSM/ITSM integration roles for agents (continued)

Role title [name]	Description	Contains roles
	• Associate an existing problem record with a customer service case. • Remove a problem record associated with a customer service case.	
sn_problem_write	Customer service agents with this role can: • Create a problem record for a customer services case. • Associate an existing problem record with a customer service case. • Remove a problem record associated with a customer service case.	sn_problem_read
sn_change_read	Customer service agents with this role can: • View information about a change record associated with a customer service case. • Associate an existing change record with a customer service case. • Remove a change record associated with a customer service case.	• dependency_views • workspace_agent • view_changer • cmdb_read • app_service_user • cmdb_query_builder_read
sn_change_write	Customer service agents with this role can: • Create a change record for a customer services case. • Associate an existing change record with a customer service case. • Remove a change record associated with a customer service case.	• sn_change_read • template_editor • cmdb_query_builder
sn_request_read	Customer service agents with this role can view information about request records	None

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CSM/ITSM integration roles for agents (continued)

Role title [name]	Description	Contains roles
	associated with a customer service case in the **Requests** related list.	
sn_request_write	Customer service agents with this role can create request records for customer service cases.	• sn_request_read • task_editor • dependency_views • workspace_agent • view_changer • cmdb_read • cmdb_query_builder_read

CSM/ITSM integration roles for external customers

These roles enable external customers to take the following actions:

- View and create request records from the Customer and Consumer Service Portals.
- Approve changes and requests from the Customer Service Portal.

CSM/ITSM integration roles for external customers

Role	Actions
Customer administrator [sn_customerservice.customer_admin]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests for themselves, for other contacts from the same account, or for child accounts. • View the request details.
Partner [sn_customerservice.partner]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests for themselves (if they also have the customer role). • Create requests on behalf of the accounts with which they have established relationships. • View cases and requests.
Customer case manager [sn_customerservice.customer_case_manager]	Users with this role can:

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CSM/ITSM integration roles for external customers (continued)

Role	Actions
	• Browse the service catalog and catalog items and make a selection. • Create requests for themselves or for other contacts from the same account. • View the request details.
Customer [sn_customerservice.customer]	Users with this role can: • Create a request. • View the request details.
Proxy contact [sn_csm_proxy_cont]	Users with this role can: • Browse the service catalog and catalog items and make a selection. • Create requests on behalf of customers. • Add the account and contact information of the customers. • View the details of the case and the related request.

Enable external customers to access problem, change, and request records

With access to problem, change, and request records, external customers can view these records associated with their customer service cases from the Customer and Consumer Service Portals.

Before you begin

Role required: admin

About this task

The snc_internal or snc_external role and with read access to the related problem, change, and request records can view these records from the Customer and Consumer Service Portals. After logging in, users can:

- Select a case and view the records related to that case in the Case Related Records widget.
- Select a record in the Case Related Records widget to open the record details in the Ticket Fields widget.

Note: The Related Records list shows data only if the logged-in user has access to view the related records.

Customers, customer partners, and internal users with the proxy contact role (sn_csm_proxy_cont) can also create requests from the Customer and Consumer Service Portals. For more information about this feature, see Create cases as a proxy contact.

Customers can also view Known Error articles for a problem related to a case. These articles are displayed:

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- If there's a KE article present for the problem record. If there are multiple articles associated with the problem, the customer has access to the primary article. If there are no articles, the customer doesn't see the link.
- If the customer has access to the KE article.

Procedure

1. Provide access to problem, change, and request records by configuring ACLs for the snc_external role.
   This access isn't provided out of box. You must add these ACLs to the snc_external user role based on case access. For more information, see Access control list rules.

   Note: Existing ACLs on the problem, change, and request records might impact the visibility for external users.

2. Configure the Case Related Records widget.
   By default, this widget is displayed for users with the snc_internal and snc_external roles. For more information, see Service Portal widgets.
3. Define the views for the problem, change, and request records and select the fields that are visible to external customers.
   For more information, see Create and delete views.

   Note: For the Consumer Service Portal, you can define views and select fields for problem and change records. Request records display a default set of fields in the Ticket Fields widget.

Related records list widget

When viewing a case on the Customer or Consumer Service Portal, external users can see other records associated with the case in the Related Records list widget.

These records can include problems, changes, and requests. Users can select a record in the Related Records widget to view additional details in a pop-up window.

Request records

For request records, users can:

- Expand or collapse a request and view a list of the items associated with the request.
- Select an item in this list to see additional information, including the state of the requested item.

Note: If a case does not have any related records, the Related Records widget does not appear on the case view page.

From the Customer and Consumer Service Portals, users can view lists of cases and requests by doing one of the following:

- Selecting **My Lists** in the portal menu header.
- Selecting **Requests** > **All Requests** in the portal menu header.

The list view page includes a **My Lists** filter with the following options:

- **All**: Displays all case and request records.
- **Action Needed**: Displays cases in the **Resolved** state that are waiting for a customer response.

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- **My Issues**: Displays the cases that were not initiated as a request.
- **My Requests**: Displays the cases that were created as a request.

Enable external customers to create requests

Enable your external customers to create and track requests from the Customer and Consumer Service Portals.

Before you begin

Role required: admin

About this task

Each submitted request generates a case, with the request record associated to that case. Customer service agents can also create requests on behalf of contacts and consumers.

Note: This feature requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request).

Procedure

Configure the Case form to display the **Initiated as request** field.
When a request is created from the portal, the system creates a case for the request and sets this field to true.

Note: The **Initiated as request** field is read-only for all users.

Related topics

Create a request on behalf of a customer or consumer

Request an item or service from the Customer Service Portal

Enable external customers to approve requests and changes

Enable your external customers to approve change and request records related to customer service cases from the Customer Service Portal.

Before you begin

Role required: admin

About this task

Changes and requests related to a case typically require end user approval before the tasks can be completed. The tasks can be initiated by customers and by external users. For example:

- A customer creates a change in order to apply a patch. This change requires approval from the contact before the patch can be applied.
- A contact requests a catalog item from the Customer Service Portal. This request requires approval by another employee within the contact's organization before the request can be fulfilled.

Use this feature to send approval requests and enable external customers with the snc_external role to approve those requests as part of the task approval workflow. From the Customer Service Portal, external customers can:

- View and approve requests and change requests.
- View the details of the requested items in a request record.
- View the status of a request or change request in the Related Records widget.

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Important: Approving requests and changes requires the approver_user role, which is a licensed role. For more information, see KB0716592.

Procedure

1. Add external users to approval groups or assign roles for approval users in order to see approval records on the Customer Service Portal.
2. Add the necessary ACLs to the snc_external role for the following tables.
   - Change Request (change_request)
   - Request (sc_request)
   - Request Item (sc_req_item)

   Note: The sn_esm_user role provides access to the approval records where the logged-in user is the approver and enables the logged-in user to either approve or reject the approval request. Customer Service Management requester roles (including the customer contact, partner contact, customer admin, and partner admin roles) contain the sn_esm_user role, which enables these roles to perform the approve and actions.

Enable the Create Request UI action for case types

Enable the **Create Request** UI action for case type tables that extend the Case [sn_customerservice_case] table.

Before you begin

Role required: admin

About this task

To enable the **Create Request** UI action for a case type table that extends the Case table, add an entry for the case type to the Request Parent Mapping [request_parent_mapping] table.

When an agent creates a request for a case in the case type table, the system adds the request to the Requests tab on the case record.

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select the Request Parent Mapping [request_parent_mapping] table.
3. Select the Show List related link to open the list view for the table.
4. Select **New** to create an entry for the case type table.
5. Fill in the following fields in the Request Parent Mapping record.
   a. Enter a name for the entry in the **Name** field.
   b. Select the case type table in the **Parent table** field.
   c. In the **Request parent** field, select Parent.
   d. In the **Parent requestor** field, select Contact.
6. Select **Submit**.

Create incident, problem, change, and request records from cases

As customer service agents, create incident, problem, change, and request records from open cases in workspaces.

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Create an incident record from a case

As a customer service agent, create an incident record from a case or associate an existing incident with a case in CRM Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More UI Actions icon (···) and select **Create Incident**.
   The following information is copied from the case to the incident record:

Case to incident field mapping

Case fields	Incident fields
Short description	Short description
Default impact	Impact
Urgency	Urgency
Contact	Caller
Configuration item (if available)	Configuration item

Note: You can manually change the incident impact and urgency to different values on the incident record as needed.

Result

Information about the incident is added as follows:

- An update with the incident number is added to the case work notes.
- The incident is added to the **Incident** field in the **Related Records** form section on the case form.
- The case number is added to the Customer Cases related list on the Incident record.
- If the case has an associated Problem, Change Request, or Caused by Change record, this information is also copied to the incident record.
- The domain of the incident is mapped to the domain of the case.

Create a problem record from a case

As a customer service agent, create a problem record from a case or associate an existing problem with a case in CRM Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More Actions icon (···) and select **Create Problem**.
   The following information is copied from the case to the Problem record:

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Case to problem field mapping

Case fields	Problem fields
Short description	Problem statement
Impact	Impact
Urgency	Urgency
Priority	Priority
Company	Company
Configuration item (if available)	Configuration item (if blank on case, agent can manually update on problem record)
Case sys_id	First reported by

Note: You can manually change the problem impact and urgency to different values on the Problem record as needed.

Result

Information about the problem is added as follows:

- An update with the problem number is added to the case work notes.
- The problem is added to the **Problem** field in the **Related Records** form section on the case form.
- The case number is added to the Customer Cases related list on the Problem record.
- The domain of the problem is mapped to the domain of the case.

Create a normal change record from a case

As a customer service agent, create a normal change record from a case or associate an existing normal change record with a case in CRM Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More Actions icon (···) and select **Create Normal Change**.
   The following information is copied from the case to the change record:

Normal Change record fields

Case fields	Change fields
Short description	Short description
Description	Description
Impact	Impact
Urgency	Urgency
Priority	Priority
Company	Company

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Case fields	Change fields
Contact	Caller
Configuration item (if available)	Configuration item **Note:** The change manager can update the configuration item on the change record. If the configuration item is not available, the agent can also manually update this information.

Note: You can manually change the change impact and urgency to different values on the change record as needed.

Default values are added to the following fields on the change record:

- **Type**: Normal
- **State**: New
- **Category**: Other
- **Risk**: Moderate

Result

Information about the change is added as follows:

- An update with the change number is added to the case work notes.
- The change is added to the **Change Request** field in the **Related Records** form section on the case form.
- The case number is added to the Customer Cases related list on the Chnage record.
- The **Requested by** field on the change record is updated with the case agent.
- The domain of the change is mapped to the domain of the case.

Create a standard change record from a case

As a customer service agent, create a standard change record from a case or associate an existing standard change record with a case in CRM Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

Procedure

1. Open a customer service case.
2. Select the More Actions icon (···) and select **Create Standard Change**.
   The standard change record is created using the Standard Change template, which is defined in the Standard Change catalog. The data mapping is created from the template; no data is copied from the case to the change record.

Create a request record from a case

As a customer service agent, create a request record from a case or associate an existing request with a case in CRM Workspace.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

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Procedure

1. Open a customer service case.
2. Select the More Actions icon (···) and select **Create Request**.
   The following information is copied from the case to the request record:

Case to request field mapping

Case fields	Request fields
Short description	Short description
Contact	Contact

Note: You can manually change the request impact and urgency to different values on the request record as needed.

Result

Information about the incident is added as follows:

- An update with the request number is added to the case work notes.
- The request is associated with the case and is added to the **Requests** related list on the Case form.
- The case number is added to the Customer Cases related list on the request record.
- The domain of the request is mapped to the domain of the case.

Create a request from the Customer and Consumer Service Portals

As customers, you can create and submit requests from the Customer and Consumer Service Portals. The request process is integrated with Service Catalog.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer, sn_csm_proxy_cont

About this task

Note: Creating a request from the Customer and Consumer Service Portals requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the system administrator provide external customers with access to request records.

Partners, partner administrators, and proxy contacts can submit requests on behalf of other accounts or contacts with the addition of the following variable set to the desired catalog items: **csm_request_variable_set**. This variable set adds the **Account** and **Contact** fields. For more information, see Service catalog variable sets.

Procedure

1. Do one of the following to create a request:
   - Click the **Request Something** link on the portal landing page.
   - Click **Requests** > **Request Something** in the portal menu header.
2. Browse the service catalog and select the desired item or service.
   You can also use the Category filters to filter the available items.
3. Fill in any necessary information related to the request.

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4. Click **Submit**.
   The following information is copied from the request to the case:

Request to case field mapping

Request fields	Case fields
Short description	Short description
Requested for	Contact
Account	Account

Result

- A new case is created, which becomes the parent of the request. One request is associated with a case and a request contains one item.
- The case is used as the reference for the customer, who can see the request status and updates from the case on the Customer Service Portal.
- All cases associated with a request appear on the request record in the **Cases** related list.

Integrating with Service Portfolio Management

Integrate Customer Service Management with the Service Portfolio Management (SPM) application. This integration gives customer service managers, customer service agents, and service owners visibility into sold products and their associated service offerings.

Using the integration between Customer Service Management and Service Portfolio Management has the following benefits:

- Increase customer service agent productivity: Empower customer service agents to quickly view the service offerings and associated definitions for sold products.
- Increase service owner productivity: Empower service owners to quickly identify customers subscribed to services.

The Customer Service Management integration with Service Portfolio Management can be used in the following ways.

1. Customer service managers can associate service offerings to product models. For more details, see Associate services with product models
2. Customer service managers can associate service offerings to sold products. For more details, see Associate service offerings with sold products
3. Service owners can view service offerings and which customers have subscribed to them.
4. Customer service agents can view which service offerings are associated to the sold products affected by an issue. They can also see the service commitments and availability. For more details, see View sold product information in CRM Workspace

Activation information

Activate the following plugin.

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Name	Description
CSM with Service Portfolio Management (SPM) [sn_csm_spm]	Enables integration with the Service Portfolio Management (SPM) application. This integration gives customer service managers, customer service agents, and service owners visibility into sold products and their service offerings.

Roles

Ensure that users can perform all the necessary actions by assigning roles.

Roles required for Service Portfolio Management (SPM) application integration

Role	Description
service_editor	Assign this role to customer service managers if they need to update any service offerings they own.
portfolio_admin	Assign this role to customer service managers if they need to associate service offerings to a product model.

Integrate with Service Portfolio Management using Guided Setup

Use the Guided Setup to integrate Customer Service Management with the Service Portfolio Management (SPM) application.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

To configure the integration with Service Portfolio Management, use the Customer Service guided setup. The guided setup takes you through the entire setup and configuration process.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Guided Setup**.
2. On the Getting Started page of the guided setup, select **Get Started**
3. In the Integration with Service Portfolio Management (SPM) category, view the list of tasks to configure the feature.

Service Portfolio Management configuration tasks

Task	Description
Activate Customer Service Management with Service Portfolio Management	Activate the CSM with Service Portfolio Management (SPM) plugin to use the integration with Service Portfolio Management.
Configure form views	Configure the form layout and related lists for the Sold Product, Case, Account, and Service Offering forms. Configuration provides users with information regarding which service

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Task	Description
	offerings are associated with each sold product.
Assign roles	Assign the required roles to customer service managers based on your organization's existing roles and responsibilities.

4. To perform a task, select **Configure**.

   This button opens the page in your instance where the configuration is completed.

Related topics

Service Portfolio Management

Activate Customer Service Management with Service Portfolio Management

Activate the CSM with Service Portfolio Management (SPM) plugin to use the integration with Service Portfolio Management.

Before you begin

Consider using guided setup to complete the Service Portfolio Management configuration. For more information, see Integrate with Service Portfolio Management using Guided Setup.

Note: Check your entitlements to determine whether you have access to the integration with Service Portfolio Management and the CSM with Service Portfolio Management (SPM) plugin (sn_csm_spm).

Role required: admin

Procedure

1. Navigate to **System Definition** > **Plugins**.
2. Search for the sn_csm_spm plugin.
3. Select **Activate**.

Configure form views for Service Portfolio Management integration

Configure the form layout and related lists for the Sold Product, Case, Account, and Service Offering forms to provide users with the correct visibility into which service offerings are associated with which sold products.

Before you begin

Role required: admin

Instead of doing the configuration through this procedure, consider using guided setup. For more information, see Integrate with Service Portfolio Management using Guided Setup.

Procedure

1. Navigate to **Customer Service**.
2. Add the following fields to forms and related lists, as required.

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Configure form views

Form	Procedure
Service Offering	Add the **Add the Sold Products** related list to provide service owners visibility into which customers have subscribed to which service offerings.
Product Model forms	Add the **Offerings** (**Offering** > **Model ID**) related list on the Product Model/Service Model forms to enable customer service managers to associate service offerings to product models. To enable the **Edit** button on the Offerings related list: **a.** Configure the list control and deselect the **Omit Edit** check box. **b.** Add the sn_customerservice_manager role. If you do not see the **Edit** button enabled, see Assign roles for Service Portfolio Management integration for more details. **Note:** To configure catalog items for product models, add the Catalog Items related list. For more information, see Configure product model and catalog item relationships.
Sold Products on the Account form	Add the **Service Offering** column to the Sold Products related list to enable customer service agents or managers to view service offerings associated with the sold product for an account or consumer.
Case	Add the **Service Offering** field for the Sold Product to the Case form. This enables customer service agents dealing with customer issues to see the service offering associated with sold product for a case.
Sold Product	Add the **Service Offering** field to the Sold Product form to enable customer service managers to associate a service offering to a sold product for an account or consumer.

Assign roles for Service Portfolio Management integration

Assign the required roles to customer service managers based on the roles and responsibilities in your organization.

Before you begin

Role required: admin

Instead of doing the configuration through this procedure, consider using guided setup. For more information, see Integrate with Service Portfolio Management using Guided Setup.

Procedure

1. Assign the service_editor role to customer service managers if they need to update any service offerings they own.
2. Assign the portfolio_admin role to customer service managers if they need to associate service offerings to a product model.

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Integrating with Continual Improvement Management

Integrate Customer Service Management (CSM) with the Continual Improvement Management (CIM) application to request improvement opportunities and to implement phases and tasks to meet performance goals, track progress, and measure success.

You can use CIM for improvements to Performance Analytics (PA) indicators and to service operations. For example, create a new improvement initiative to:

- Reduce the open case backlog.
- Improve the average case response time.

See Continual Improvement Management for more information about how CIM can help you with setting goals, organizing effort, and completing tasks.

Use CIM with Customer Service Management

To use CIM with Customer Service Management, you must request the Continual Improvement Management (com.sn_cim) plugin. For more information, see Request Continual Improvement Management.

Related topics

Continual Improvement Management overview

Continual Improvement Management roles

Requesting improvements

Managing improvements

Integrate with Continual Improvement Management

Customer Service Management provides an integration with the Continual Improvement Management application. This integration enables you to request improvement opportunities and to implement phases and tasks to meet performance goals, track progress, and measure success.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Continual Improvement Management (com.sn_cim) plugin.
3. Click **Activate**.

Integrating with IT Operations Management

The Proactive Customer Service Operations plugin (com.snc.proactive_cs_itom) provides an integration between Customer Service Management and the Event Management console in IT Operations Management.

This integration enables you to create cases proactively from alerts either manually or through automation and track the accounts and the corresponding install base items affected by the alert. It also enables you to view the service health status of their install base items.

For more information, see Integration with Event Management.

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Integrate with ITOM Event Management

Customer Service Management provides an integration with the ITOM Event Management application. This integration enables you to create cases proactively from alerts either manually or through automation and track the accounts and the corresponding install base items affected by the alert.

Before you begin
Role required: admin

About this task
For more information about this integration, see Integration with Event Management.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Proactive Customer Service with Event Management plugin (com.snc.proactive_cs_itom).
3. Select **Activate**.

Integrating with Customer Project Management

Integrate Customer Service Management with the Project Portfolio Management application. This integration enables customers to manage complex projects with multiple tasks and provide end users with visibility into these projects.

Customer Service Management provides an integration with the ServiceNow® PPM Standard application, earlier known as Project Portfolio Suite with Financials.

Customers can use this integration to create projects and project tasks for their customer accounts. Customers can also provide end users with visibility into their projects and tasks from the Customer Service Portal and enable them to request additional actions.

Product use rights included with this application

When subscribed to the Strategic Portfolio Management (SPM) Subscription Product, Customer Service Management users can create and edit projects. External CSM users can view projects#and#edit project tasks of their own or related#accounts.

Customer Project Management Guided Setup

Activating the Customer Project Management plugin adds the Customer Project Management section to the Customer Service Management Guided Setup. For more information, see Integrate with Customer Project Management using Guided Setup.

Install Customer Project Management

You can install the Customer Project Management application (com.snc.csm_ppm) if you have the admin role.The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin
This plugin requires the Case Management Core plugin (com.sn_customerservice) and the PPM Standard plugin (com.snc.financial_planning_pmo).

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The Customer Project Management application adds the **Customer Service** > **Projects** module to the application navigator. Users with the customer project manager role can access this module.

- 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.
- Review the Customer Project Management application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

About this task

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Customer Project Management application (com.snc.csm_ppm) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. **Optional:** If demo data is available and you want to install it, select the **Load demo data** check box.
   Demo data are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
6. Select **Install**.

Integrate with Customer Project Management using Guided Setup

Use the Customer Service Management Guided Setup to configure Customer Project Management.

Before you begin

Role required: csm_guided_setup_user or admin

About this task

You can configure a number of different processes and components for the Customer Project Management feature using Guided Setup.

Procedure

1. Navigate to **Customer Service** > **Administration** > **Guided Setup**.
2. Select **Get Started** on the Customer Service Management home page.

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3. Scroll through the list of categories, locate Customer Project Management, and select **Get Started**.

   The following table provides a description of the configuration steps included in this guided setup section.

Customer Project Management configuration tasks

Task	Description
Activate PPM Standard.	Activate the PPM Standard plugin (com.snc.financial_planning_pmo).
Activate Customer Project Management.	Activate the Customer Project Management plugin (com.snc.csm_ppm).
Configure form views.	Configure the Case form and add the following fields to the Case view, Workspace view, and Customer Self-Service view: ○ Project ○ Project Task ○ Issue ○ Project Change Request
Configure related lists.	Configure the Account form and add the **Projects** related list to the Case view and Workspace view. Configure the Contact form and add the **Projects** related list to the Case view and Workspace view. Configure the Customer Project Task form and add the following related lists to the **Default** view: **Work Order** > **Initiated From**. This step can only be completed if the following plugins are active: ○ Customer Service with Field Service Management (com.snc.csm_fsm_integration) ○ Field Service with Project Management (com.snc.wm_ppm)
Configure notifications.	Configure the **Send Email to Contact when Customer Project Task is assigned** Flow Designer flow to send an email to the assigned contact when a customer project task is assigned. Configure the **Send Email to SO member when SO Customer Project Task is assigned** flow to send an email to assignees when assigned is changed on a customer project task that is customer visible. On selecting **Configure**, the following details of the selected flow are displayed and can be configured as required:

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Task	Description
	○ Project number and name ○ Task number and short description ○ Task planned start and end dates and duration
Configure Flow Designer flows.	Use Flow Designer flows provided with Customer Project Management to: ○ Configure the fields that are copied over, when you create a project issue or project change request from a case. ○ Update the work notes for a case record when the state of an associated project issue or project change request is updated. ○ Close a case record when an associated project issue or project change request is closed. **Create Project Issue from Case**: When a project issue is created from a case, this flow copies the **Priority** and **Short description** fields from the case to the project issue record. This flow is active by default. **Create Project Change Request from Case**: When a project change request is created from a case, this flow copies the **Priority** and **Short description** fields from the case to the project change request record. This flow is active by default. **Update and Close Case Record on Issue Closure**: This flow enables you to automatically: ○ Update the case work notes when the state of an associated issue is updated. ○ Close a case if the state of the associated issue is set to Closed. Activate this flow as needed. **Update and Close Case Record on Project Change Closure**: This flow enables you to automatically: ○ Update the case work notes when the state of an associated project change request is updated. ○ Close a case if the state of the associated project change request is set to Closed. Activate this flow as needed.
Assign Access Controls (ACLs)	Assign ACLs to the Customer Service Management user roles to provide access to the Project Portfolio Management tables, including the Project Change Request, Status Report, and Issues tables.

Customer Project Management personas, roles, and tables

An overview of the tasks that can be performed by the different Customer Project Management roles.

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Personas and roles

The following table lists the personas, their description, and the roles included with them.

Customer Service Management personas and roles

Persona	Description	Required roles
Customer project manager	A user who creates and manages projects for customer accounts. • Creates projects. • Set up project tasks and resource plans. • Identifies customer contacts who have access to projects and project tasks. • Assigns and manages tasks and dependencies.	• it_project_manager • sn_customerservice.projectmanager
Location Project Member [sn_bus_loc.location_project_stakeholder]	Views project details and project tasks of their respective business location. Marks project task as complete.Assigns business organization project tasks to other location staff, project stakeholders, and assignment group.	None
Location Project Manager Contributor [sn_bus_loc.location_manager_project_stakeholder]	Views project details and project tasks of their respective business location and child business locations. Marks project task as complete. Assigns business organization project tasks to other location staff, project stakeholders, and assignment group.	None
Service Organization Project Manager [sn_service_org.project_manager]	This role can perform the following actions: • Project initiation: Creates and launches projects **Note:** Service Organization project manager and customer project manager can access all project modules.	• sn_bus_loc.ibl_viewer • sn_bus_loc.ebl_viewer

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Customer Service Management personas and roles (continued)

Persona	Description	Required roles
	• Project planning: Develops project plans, such as, task assignments and resource allocation. **Note:** On task assignment, an automated mail is generated. Update "Send Email to Contact when Customer Project Task is assigned" flow to disable or enable notifications. • Task management: Monitors and manages task dependencies and execution. • Coordination: Views and collaborates with location staff, assigning, and tracking tasks of their respective location.	
Project stakeholder	A user who is responsible for activities that require viewing customer project details and project tasks.	• sn_customerservice.projectstakeholder • Minimum one CSM role
Customer service agent	A user who can create cases from projects and project tasks and resolve cases within the set SLA. • work on cases created from projects and project tasks. • Communicates with the customer on case status.	• sn_customerservice_agent • sn_customerservice.projectstakeholder
Customer	An external user who is responsible for overseeing the project delivery.	Any of the following CSM external roles: • sn_customerservice.customer • sn_customerservice.customer_admin

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Customer Service Management personas and roles (continued)

Persona	Description	Required roles
	• Review project status and progress on the Customer Service Portal. • Completes assigned tasks. • Creates cases for project issues.	• sn_customerservice.partner • sn_customerservice.partner_admin

Tables

Tables are added with activation of the Customer Project Management plugin.

Customer Project Management tables

Table	Description
Customer Project [customer_project]	Stores customer projects.
Customer Project Task [customer_project_task]	Stores customer project tasks
Project Contact [project_contact]	Stores project contacts.

The following columns are added to the Case table:

- Customer Project
- Customer Project Task
- Issue
- Project Change Request

Customer Project Management domain separation

With Customer Project Management, you can create customer projects for customer accounts. Domain separation for customer projects is based on the account domain. New projects are created in the same domain as the associated customer account.

Customer project child entities use the domain of the parent project. Child entities include:

- Project tasks
- Requirements
- Project budget
- Status reports
- Risks
- Issues

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- Decisions
- Actions
- Project change requests
- Stakeholders
- Project contacts
- Expense lines
- Time cards

The project manager can add sub projects to a customer project if the sub projects belong to the following accounts:

- Accounts in the same hierarchy as the main project account.
- Accounts that have a relationship to the main project account.

Customer project manager tasks

A customer project manager can perform specific tasks to manage projects for customer accounts.

A customer project manager requires the following roles to perform the tasks described in the following table:

- it_project_manager
- sn_customerservice.projectmanager

Customer project manager tasks

Task	Details
Create a project for a customer account	**1.** Navigate to **Customer Service** > **Projects** > **Create New**. **2.** Enter a name for the project in the **Project Name** field. **3.** Select an account in the **Account** field. **4.** Fill in additional project information. **5.** Click **Save**.
Create a project for a customer account from a project template	**1.** Navigate to **Customer Service** > **Projects** > **Create New**. **2.** Click a template at the bottom of the form to apply the template to the project. If the templates do not appear at the bottom of the form, click the More options icon at the top of the form and select **Toggle Template Bar**. **3.** Enter a name for the project in the **Project Name** field. **4.** Select an account in the **Account** field.

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Customer project manager tasks (continued)

Task	Details
	5. Fill in additional project information. **6.** Click **Save**.
Create a project task for a customer project	**1.** Navigate to **Customer Service** > **Projects** > **All**. **2.** Select a project. **3.** In the **Project Tasks** related list, click **New**. **4.** Add a short description for the task. **5.** Fill in additional project task information. **6.** Click **Save**.
Identify the project tasks on a project template that are visible to external customers	**1.** Navigate to **Customer Service** > **Projects** > **Templates**. **2.** Select a template. **3.** In the **Project Template Tasks** related list, select a task. **4.** In the Data section of the Project Template Task form, add the **Visible to customer** field and set it to **true**. **5.** Click **Update**. **6.** Repeat for other project tasks as needed.
Identify project tasks that are visible to external users	**1.** Navigate to **Customer Service** > **Projects** > **All**. **2.** Select a project. **3.** In the **Project Tasks** related list, select a task. **4.** Enable the **Visible to customers** field. **5.** Click **Save**.
Identify the account contacts who have access to a project	To give customers visibility into projects from the Customer Service Portal, you must add one or more contacts to the project. • Contacts must belong to the account linked with the project. • Partner contacts must have access to the account linked with the project. • Contacts who have a relationship with the account can also be added to the project.

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Customer project manager tasks (continued)

Task	Details
	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. In the **Project Contacts** related list, click **New**. 4. Select a contact in the **Contact** field and click **Submit**.
Assign project tasks to internal users, customer contacts, or customer partner contacts	See Assign a project task .
See the cases that have been created for a project or project task	View cases in the **Cases** related list on the Customer Project form and Customer Project Task form. Click a case to view the case details. **Note:** The customer project manager has read-only access to the Case form.
Add a comment or an attachment to a case that has been created for a project or project task	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. In the **Cases** related list, select a case. 4. Add a comment in **Additional comments** field. 5. Click the attachment icon, select a file, and attach it to the case. 6. Click **Update**.
Create project change requests and project issues for cases that have been created for a project or project task	See the following tasks: • Create a project issue for a case • Create a project change request for a case
Save a customer project as a template	1. Navigate to **Customer Service** > **Projects** > **All**. 2. Select a project. 3. Click the **Save as New Template** related link. 4. In the Create Template popup window, enter a template name and description.

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Customer project manager tasks (continued)

Task	Details
	5. Click **OK**. **6.** Update the template as needed and click **Update**.

Assign a project task

The customer project manager can assign a customer project task to an internal user, a customer or partner contact, or a contact that has a relationships to the account.

Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task

Assigning a task to an external user enables the **Visible to customer** field on the Project Task form. Customers can view assigned tasks in the Project Tasks list on the Customer Service Portal. The system sends an email notification to the customer when a customer project task is assigned.

Procedure

1. Navigate to **Customer Service** > **Projects** > **All**.
2. Click a project in the Customer Projects list.
3. Click the **Project Tasks** related list on the Customer Project form.
4. Click a task to open the Customer Project Task form.
5. Select a contact or partner contact in the **Assigned to** field.
   Users are stored in the User [sys_user] table.
6. Click **Update**.
   The system sends an email notification to the assigned user.

Create a project issue for a case

The customer project manager can create project issues for cases that have been created for customer projects and project tasks.

Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task

The project manager can create one issue for a case.

Procedure

1. Navigate to **Customer Service** > **Projects** > **All**.
2. Click a project in the Customer Projects list.
3. In the **Cases** related list, click a case.
4. Click **Create Issue** on the Case form.

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The system creates a new issue for the project and copies the **Short description** and **Priority** from the case.

5. Fill in the details for the issue and click **Save**.
   The system does the following after you save the issue:
   - Adds the case number to the activity stream on the Issue form.
   - Adds the issue number to the activity stream on the Case form.
   - Adds the issue to the **Issues** related list on the Customer Project form.
   - Adds the issue to the **Issue** field in the Related Records section of the Case form.

Create a project change request for a case

The customer project manager can create project change requests for cases that have been created for customer projects and project tasks.

Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task

The project manager can create one project change request for a case.

Procedure

1. Navigate to **Customer Service** > **Projects** > **All**.
2. Click a project in the Customer Projects list.
3. In the **Cases** related list, click a case.
4. Click **Create Project Change Request** on the Case form.
   The system creates a new change request for the project, copies the case short description to the **Title** field, and the case priority to the **Priority** field.
5. Fill in the details for the change request and click **Save**.
   The system does the following after you save the change request:
   - Adds the case number to the activity stream on the Project Change Request form.
   - Adds the project change request number to the activity stream on the Case form.
   - Adds the project change request to the **Project Change Requests** related list on the Customer Project form.
   - Adds the project change request to the **Project Change Request** field in the Related Records section of the Case form.

Create a customer project from an idea

Create a customer project from an idea on the Idea Portal.

Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

About this task

The Idea Portal provides a central location to collect, curate, and promote ideas into demand, project, epic, or story. With the Customer Service Management integration with Project Portfolio Management, you can also create a customer project from an idea. For more information, see Idea Portal.

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Procedure

1. Navigate to **All** > **Ideas** > **Idea Portal**.
2. Click the title of an idea that you want to create a task for.
3. Open the idea in form view by clicking the More Options icon and selecting **Open in platform**.
4. In the Idea pop-up window, click **Create Task**.
5. In the Convert Idea to Task pop-up window, select Customer Project in the **Select task type** field and click **OK**.
   The system creates the project and displays the project number in an information message at the top of the Idea pop-up window. On the Customer Project form, the idea record is added to the Ideas related list.

Create a customer project from a demand

Create a customer project from a demand record.

Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

Procedure

1. Create a demand record by navigating to **Demand** > **Demands** > **Create New**.
2. Fill in the fields on the Demand form and click **Save**.
   For more information about the fields on this form, see Create a demand.
3. Open the demand record and click the **Create Project** related link.
4. In the Create Project pop-up window, select Customer Project in the **Project class** field.
5. Click **OK**.
   The system creates the project and displays the project number in an information message at the top of the Demand form. On the Customer Project form, the demand record is added to the Demands related list.

Customer service agent tasks

A customer service agent can view customer projects and create cases for customer projects and tasks.

An agent must have the following roles to perform the tasks described in the following table:

- sn_customerservice_agent
- sn_customerservice.projectstakeholder

Customer service agent tasks

Task	Details
View customer projects	Customer service agents can view a list of customer projects by navigating to **Customer Service** > **Projects** > **All**. Click a project in this list to view project details on the Customer Project form, including project tasks, project contacts, and sub projects.

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Customer service agent tasks (continued)

Task	Details
	Note: Agents have read-only access to project details.
View the projects and project tasks created for an account	Customer service agents can see projects that are linked to customer accounts. From a customer account record, agents can see the projects for that account in the **Projects** related list. Click a project in this list to view project details on the Customer Project form, including project tasks, project contacts, and sub projects. **Note:** Agents have read-only access to project details.
See the projects and project tasks associated with a contact	Customer service agents can see the projects and project tasks that are associated with a contact. Navigate to **Customer Service** > **Customer** > **Contacts** and select a contact. • Click the **Projects** related list to see projects. • Click the **Project Tasks** related list to see tasks. **Note:** If necessary, configure the Contact form to add these related lists.
Create a case for a project	Customer service agents and agent managers can create cases for customer projects. When creating a case, the agent selects a project in the **Project** field on the Case form. • If an account has been selected in the **Account** field, the agent can select from the projects that are associated with that account. • If the **Account** field is empty, the agent can select from all projects that have been created for an account. Upon selection, the **Account** field is populated with the associated account. When created from a project, these fields are automatically set on the Case form.

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Customer service agent tasks (continued)

Task	Details
	Cases created for a project appear in the **Cases** related list on the Customer Project form.
Create a case for a project task	Customer service agents and agent managers can create cases for customer project tasks. When creating a case, the agent selects a task in the **Project Task** field on the Case form. • If a project has been selected in the **Project** field, the agent can select from the project tasks that have been created for that project. • If the **Project** field is empty, the agent can select from the project tasks for all projects that have been created for an account. Upon selection, the **Project** and **Account** fields are populated with the associated project and account. When created from a project task, these fields are automatically set on the Case form. Cases created for a project task appear in the **Cases** related list on the Customer Project form and the Customer Project Task form.

Customer tasks

From the Customer Service Portal, external users can view projects, complete assigned tasks, and create cases for project issues.

A user must have one of the following CSM external roles to perform the tasks described in the following table:

- sn_customerservice.customer
- sn_customerservice.customer_admin
- sn_customerservice.partner
- sn_customerservice.partner_admin

Various customer tasks

Task	Details
View projects and project details	Customers can view the projects created for their accounts if they've been associated with the project as a project contact. Customers have read-only access to project details on the Customer Project form.

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Various customer tasks (continued)

Task	Details
	Customers can also view records in the following related lists if the system administrator has configured the corresponding ACLs for each of the tables. • Customer Project Tasks • Project Change Requests • Status Reports • Sub Projects • Work Orders • Project Contacts **Note:** The Work Orders related list is displayed if the following plugins are active: Field Service with Project Management (com.snc.wm_ppm) and Customer Service with Field Service Management (com.snc.csm_fsm_integration). To view projects: 1. Click **Support** in the Customer Service Portal header. 2. Click **Projects** and select a project from the Customer Projects list. 3. View the details in the Customer Project form.
View and update project tasks	Customers can view project tasks for the projects that have been created for their accounts if: • They have been associated with the project as a project contact. • The project tasks have been marked as **Visible to customer**. Customers can view and update project tasks that have been assigned to them by the customer project manager. To view and update project tasks: 1. Click **My Lists** in the Customer Service Portal header. 2. Click **My Project Tasks** and select a task from the Customer Project Tasks list.

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Various customer tasks (continued)

Task	Details
	3. View the details in the Customer Project Task form. **4.** Update the **Actual start date** and **Actual end date** fields as needed and click **Save**. **5.** Add a comment in the **Activity** field and click **Post**. **Note:** Customers can also view tasks directly from **Support** > **Projects** > **Project Tasks**.
Complete project tasks	When a customer completes the work for a project task, they can mark the task as complete. **1.** Click **My Lists** in the Customer Service Portal header. **2.** Click **My Project Tasks** and select a task from the Customer Project Tasks list. **3.** Click **Mark Complete** in the Actions widget.
Create cases for projects and project tasks	Customers can create cases for projects and project tasks if they have been associated with a project as a project contact. Customers can create cases in two ways: • From a project or, project task form. • From the Case menu in the Customer Service Portal header. To create a case from a project or project task: **1.** Navigate to a Customer Project form or a Customer Project Task form. **2.** Click **Create Case** in the Actions widget. **3.** Fill in the fields on the Create Project Case record producer. The **Project** and **Project Task** fields are auto populated. **4.** Click **Submit**. To create a case from the Case menu. **1.** Click **Case** in the Customer Service Portal header and select **Create Project Case**. **2.** Fill in the fields on the Create Project Case record producer. **3.** Click **Submit**.

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Various customer tasks (continued)

Task	Details
	The Create Project Case record producer includes **Project** and **Project Task** fields. These fields are displayed if a customer has access to any of the project tasks. Project and project task selection is limited to the projects for the customer's account.
View a list of cases created for the projects and project tasks for an account	Customer administrators, partner administrators, and customer case managers can see all cases that have been created for the projects and project tasks for an account. **1.** Click **My Lists** in the Customer Service Portal header. **2.** Click **All Cases** in the My Lists widget.
View the project change request and project issue records created for a case	Customer contacts can view the project change request and project issue records that have been created for a case if: • They have been added to a project as a project contact. • The system administrator has configured the corresponding ACLs for each of the tables. **1.** Click **My Lists** in the Customer Service Portal header. **2.** Click **All Cases** in the My Lists widget. **3.** Select a case from the Cases list. **4.** View the records in the Related Records widget.

Customer Service Investment Portal

The Customer Service Management integration with Project Portfolio Management provides access to a CSM-specific view of the Investment Portal, which displays customer projects.

Use the CSM Investment Portal to do the following:

- Add CSM-specific columns to investment boards
- Add filters to CSM-specific columns on investment boards

You can view both customer projects and IT projects in the IT Investment Portal. For more information, see Investment Portal in the Project Management documentation.

Create an investment board on the CSM Investment Portal

Create an investment board on the CSM Investment Portal and add the desired customer service project-specific information.

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Before you begin

Role required: customer project manager (it_project_manager + sn_customerservice.projectmanager)

Procedure

1. Navigate to **All** > **Customer Service** > **Projects** > **Investment Portal**.
2. Click **New**.
3. Fill in the fields on the Create New pop-up window.
   For more information about these fields, see Create an investment board.
4. Click **Create**.
   Once the investment board is created, it opens up in the CSM Investment Portal page.

Integrating with Financial Management

Customer Service Management and Field Service Management provide an integration with the ServiceNow® Financial Management application as well as dashboards and reports.

The Financial Management application enables you to allocate, track, and report on expenses in your organization. When the Financial Management application allocates an expense, it breaks down the expense into detailed amounts of money called allocations. These allocations can be associated with specific segments and accounts for a specific cost model. The integration with Financial Management provides cost allocations for Customer Service Management and Field Service Management.

Use these cost allocations on the Financial Management workbench, which provides financial administrators with a graphical interface to allocate expenses. Access the workbench through the **Cost Transparency** > **Workbench** module.

Plugins

Two different plugins, one for Customer Service Management and one for Field Service Management, enable the integration with Financial Management. These plugins also add dashboards based on cost allocations.

- Performance Analytics - Content Pack - Financial Management for Customer Service plugin (com.snc.pa.fm.csm).
- Performance Analytics - Content Pack - Financial Management for Field Service Management plugin (com.snc.pa.fm.fsm)

The Performance Analytics - Content Pack - Financial Management for Customer Service plugin includes demo data for FY16: Q1 through FY17: Q2. The demo data includes records with the CSFM prefix, which indicates that the records are for the Customer Service Management integration with Financial Management. Activating the plugin adds these records to the Case (sn_customerservice_case) table.

Note: The Performance Analytics - Content Pack - Financial Management for Field Service Management plugin doesn't include demo data.

Cost models

A cost model is a set of rules, methods, and metrics that determines the allocation of expenses. Select cost models on the Data Definitions tab of the Financial Management workbench.

For Customer Service Management, the integration with Financial Management provides these cost models:

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- **CSM Allocation Model for Cost Account**: Allocates expenses for individual B2B customer accounts.
- **CSM Allocation Model for Channels**: Allocates expenses for communication channels.

For Field Service Management, the integration with Financial Management provides this cost model:

FSM Allocation Model for Company: Allocates expenses for companies.

Segment hierarchy

All accounts in the chart of accounts belong to segments which are structured in a hierarchy. This hierarchy enables the roll-up of expenses from lower-level accounts and segments to higher-level accounts and segments.

- **CSM Allocation Model for Cust Account** uses this segment hierarchy: Assignment Group > Product > Customer Account.
- **CSM Allocation Model for Channels** uses this segment hierarchy: Assignment Group > Product > Channels.
- **FSM Allocation Model for Company** uses this segment hierarchy: Assignment Group > Product > Company.

Account buckets

Use account buckets to categorize cleansed expenses before assigning them to accounts and segments. Account buckets can be organized in parent-child relationships so that several child buckets can refer to a single parent bucket.

The Customer Support and Field Service Support account buckets include:

- Facilities
- IT Chargeback
- Payroll and Labor Expenses
- Professional Fees & Services
- Supplies
- Training
- Other expenses

Allocation metrics

Allocation metrics are rules that you can create and use to split an allocation based on dimensions such as:

- Number of Customer Service cases: Allocate expenses to a product based on the number of cases closed in a fiscal period.
- Total Customer Service case resolution time: Allocate expenses to a product based on the total hours worked on cases closed in a fiscal period.
- Number of Field Service work order tasks: Allocates expenses to a product based on the number of work order tasks completed in a fiscal period.
- Total work order completion time: Allocates expenses to a product based on the total hours worked on tasks completed in a fiscal period.

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For Customer Service Management, the integration with Financial Management provides these allocation metrics:

- CSM Allocate to Assignment Groups by Headcount
- CSM Allocate to Product by # Cases
- CSM Allocate to Product by Case Time Worked Duration
- CSM Rollup from AssgGrp to Product by # Cases
- CSM Rollup from AssgGrp to Product by Case Time Worked Duration
- CSM Rollup from Product to Account by # Cases
- CSM Rollup from Product to Account by Case Time Worked Duration

For Field Service Management, the integration with Financial Management provides these allocation metrics:

- FSM Allocate to Assignment Groups by Headcount
- FSM Allocate to Product by # Work Orders
- FSM Rollup from Product to Company by # Work Orders

User roles

These roles can access the Financial Management workbench (**Cost Transparency** > **Workbench**):

- cost_transparency_analyst
- cost_transparency_admin
- financial_mgmt_user
- financial_mgmt_admin

Dashboards and reports

The Performance Analytics - Content Pack - Financial Management for Customer Service and Performance Analytics - Content Pack - Financial Management for Field Service Management plugins provide the following dashboards:

- CSM Financials Dashboard
- FSM Financials Dashboard

Navigate to **Performance Analytics** > **Dashboards** and select the desired dashboard from the Dashboard menu.

Integrate with Financial Management

Customer Service Management provides an integration with the ServiceNow® Financial Management application as well as dashboards and reports.

Before you begin

Role required: admin

About this task

Note: The Financial Management For CSM plugin (com.snc.financial_management_for_csm) is no longer available for direct activation by the system administrator. You can request this plugin through the HI Customer Service system.

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Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the Performance Analytics - Content Pack - Financial Management for Customer Service plugin (com.snc.pa.fm.csm).
3. Click **Activate**.

Integrating with Adobe Experience Manager

Extend Customer Service Management and Knowledge Management capabilities through ServiceNow components in Adobe Experience Manager (AEM) to deliver a pre-integrated web experience for external customers.

When working with a website built on AEM, you can embed Customer Service Management and Knowledge Management capabilities related to customer service cases and knowledge articles respectively within the website. The integration with AEM provides the following advantages:

- Use ServiceNow knowledge and case components on your branded websites built on AEM.
- Ensure a unified and consistent experience for end users to access information when and where they need it.

Supported AEM versions

Beginning with AEM 6.5, you can add knowledge and case components to pages of your websites built on AEM and use pages available within the ServiceNow site in AEM as a reference to design your website content. For more information, see ServiceNow pages in Adobe Experience Manager, Display ServiceNow knowledge articles on an Adobe Experience Manager page, and Display ServiceNow cases on an Adobe Experience Manager page.

ServiceNow Components for AEM package

Install the **ServiceNow Components for AEM** package on your AEM instance. You can download the package by using the direct download URL or accessing the package at https://experience.adobe.com/downloads. For more information, see Experience Cloud Software Distribution in the Adobe Help Center.

After you install the package, configure authentication and integration settings for ServiceNow services and components in AEM. For more information, see Configuring authentication settings for ServiceNow services and components in AEM and Configuring integration settings for ServiceNow services and components in AEM.

Integrate Customer Service Management with Adobe Experience Manager

Deliver a pre-integrated web experience for external customers by using ServiceNow components in Adobe Experience Manager (AEM).

Before you begin

Role required: admin

About this task

This task provides the general steps to integrate Customer Service Management and Knowledge Management capabilities with AEM.

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Procedure

1. Install the **ServiceNow Components for AEM** package on your AEM instance.
   You can download the package by using the direct download URL or accessing the package at https://experience.adobe.com/downloads. For more information, see Experience Cloud Software Distribution in the Adobe Help Center.
2. Configuring authentication settings for ServiceNow services and components in AEM.
3. Configuring integration settings for ServiceNow services and components in AEM.

Configuring authentication settings for ServiceNow services and components in AEM

Enable logging in to both the Adobe Experience Manager (AEM) instance of your website and the ServiceNow instance using a third-party OpenID Connect (OIDC) provider that supports both OIDC and single sign-on (SSO) protocols.

You can select Okta or Microsoft Azure as the third-party OIDC provider that supports both OIDC and single sign-on (SSO) protocols.

Note: Your AEM instance must use the selected third-party OIDC provider as the SSO provider.

Register ServiceNow with a third-party OIDC provider

Register ServiceNow as a web application with a third-party OIDC provider to validate the identity of a user using a JSON Web Token (JWT).

Before you begin

ServiceNow identifies an end user by sending the JWT token containing the end user information to the OIDC provider. The process to register ServiceNow with the OIDC provider varies depending on the provider.

Note:

This topic uses Okta as an example, but you can substitute the details of your own OIDC provider.

Role required: Okta account (Third-party OIDC provider account)

Procedure

1. Log in to your Okta account.
2. Select the Applications menu.
3. On the Applications page, click **Add Application**.
4. On the Create New Application page, select **Web**.
5. Fill in the fields.

OIDC settings

Field	Value
Application label	Unique application name for your ServiceNow instance.
Authorization Code	Selected

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Field	Value
Refresh Token	Selected
Login redirect URIs	Callback URL of your AEM instance. The URL structure is: `https://<AEM-instance>:<AEM_port>/bin/now/auth/callback`
Login initiated	App Only

6. Click **Done**.

What to do next

In the Client Credentials section, record the Client ID and Client secret values for when you set up Okta as an OAuth provider in your ServiceNow and AEM instances.

Add an OIDC provider to the ServiceNow instance

Add a third-party OIDC provider service to your ServiceNow instance to verify the identity of end users.

Before you begin

You must have configured the third-party OIDC provider service as an OAuth provider and recorded your **Client ID** and **Client secret** values. For more information, see Register ServiceNow with a third-party OIDC provider.

Role required: oauth_admin

Procedure

1. Navigate to **All** > **System OAuth** > **Application Registry**.
2. Set up OAuth for your ServiceNow instance.
   - Click **New**, select **Configure an OIDC provider to verify ID tokens**, and then fill in the Application Registries form.
   - Select an existing template for your OIDC provider (Okta or Microsoft Azure), and then either accept the default values in the Application Registries form or modify them.

     Note: OIDC provider templates are available after loading demo data with the OAuth 2.0 plugin. For more information, see Configure an OAuth OIDC provider.

Application Registries form

Field	Description
Name	Unique name for the OAuth provider.
Client ID	Client ID you recorded earlier for your ServiceNow instance registered in the third-party OIDC server. The ServiceNow instance uses the client ID when requesting an access token.
Client Secret	Client secret you recorded earlier for your ServiceNow instance registered in the third-party OIDC server.

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Field	Description
OAuth OIDC Provider Configuration	OIDC provider with which you registered your ServiceNow instance. **Note:** Select the record of your OIDC provider configuration or create another configuration, if not available, to ensure that the **OIDC Metadata URL** field value is correct and the **User Claim** and **User Field** fields are mapped correctly.

3. Save your changes.
   - For an existing template, click **Update**.
   - For a new template, click **Submit**.

Configure OIDC provider details in Adobe Experience Manager

Configure the third-party OIDC provider details in your Adobe Experience Manager (AEM) instance to access the ServiceNow components as an authenticated user.

Before you begin

You must have configured the third-party OIDC provider service as an OAuth provider and recorded your **Client ID** and **Client secret** values (see Register ServiceNow with a third-party OIDC provider).

Role required: AEM administrator

About this task

Configure the OIDC provider details in AEM to enable the AEM users to access the ServiceNow instance as authenticated users. If you don't configure the OIDC provider details in AEM, an AEM user is considered as a public user when accessing the ServiceNow instance.

Procedure

1. Access the web console in AEM with a URL in the following format: `https://<AEM_hostname>:<AEM_port>/system/console/configMgr`.
2. Search for `ServiceNow OAuth Configuration`.
3. In the **Name** column, click the **ServiceNow OAuth Configuration** link.
4. Provide values for the configuration settings.

ServiceNow OAuth Configuration settings

Field	Description
ServiceNow Client ID	Client ID you recorded when setting up the OAuth for your ServiceNow instance.
ServiceNow Client Secret	Client secret you recorded when setting up the OAuth for your ServiceNow portal.
OAuth Provider Auth URL	Authorization server end point used for obtaining the authorization code. In the following URL structure, substitute the domain name of the authorization server of your third-party OIDC provider. Example: `https://<auth_server_domain>/oauth2/authorize`

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Field	Description
OAuth Provider Access Token URL	Authentication server endpoint used for exchanging the authorization code for an access token. In the following URL structure, substitute the domain name of the authorization server of your third-party OIDC provider. Example: `https://<auth_server_domain>/oauth2/token`
Authorization request scope	List of scopes for limiting the authorization access. **Note:** The default value `openid email profile offline_access` works for most OIDC providers (for example, Okta).
User property to store refresh token	Name of the user property to store the authentication refresh token. **Note:** Once filled, this token is used to obtain access tokens for that user in all future requests.

5. Click **Save**.

Configuring integration settings for ServiceNow services and components in AEM

You have to set up your ServiceNow services and components to integrate with your Adobe Experience Manager (AEM) instance.

Settings to enable use of ServiceNow services in AEM

You can define the following types of configuration settings for ServiceNow services in AEM:

- Authentication settings with a third-party OIDC provider (see Configure OIDC provider details in Adobe Experience Manager).
- Specific settings for ServiceNow services (see Define OSGi configuration settings for ServiceNow services).
- Log file settings for ServiceNow services (see Configure log file settings for ServiceNow services in Adobe Experience Manager).

Settings for using ServiceNow components in AEM

To use the Knowledge API endpoint on your AEM instance, you have to define the cross-origin resource sharing (CORS) rule on your ServiceNow instance. For more information, see Define a cross-origin resource sharing rule (CORS) to access ServiceNow API endpoints from AEM.

Define OSGi configuration settings for ServiceNow services

Define OSGi configuration settings for ServiceNow services used by ServiceNow components in Adobe Experience Manager (AEM).

Before you begin
Role required: AEM administrator

Procedure

1. Access the web console in AEM using a URL in the following format: `https://<AEM_hostname>:<AEM_port>/system/console/configMgr`.
2. Search for `ServiceNow Configuration`.

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3. In the **Name** column, click the **ServiceNow Configuration** link.
4. Provide values for the configuration settings.

ServiceNow Configuration settings

Field	Description
Base Instance URL	Complete URL of your ServiceNow instance.
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. For multiple entries, separate the knowledge bases with commas. **Note:** A blank value indicates articles from all knowledge bases in your ServiceNow instance are accessible to a user with appropriate permissions.
Show Articles in All Languages	Option to show knowledge articles in all languages for ServiceNow components.

5. Click **Save**.

Configure log file settings for ServiceNow services in Adobe Experience Manager

Configure log file settings for ServiceNow services in Adobe Experience Manager (AEM) to generate debug logs to help identify issues in the authentication process.

Before you begin

Role required: AEM administrator

Procedure

1. Access the web console in AEM using a URL in the following format: `https://<AEM_hostname>:<AEM_port>/system/console/configMgr`.
2. Navigate to **OSGi** > **Configuration**.
3. Search for and select **logs/project-servicenow-components.log: info**.
4. Verify the default field values, or fill in your own values for a custom configuration.

Logger configuration settings

Field	Value
Log Level	Debug
Log File	Path of the ServiceNow log file.
Message Pattern	Message-format pattern for formatting log messages.
Logger	Logger name for ServiceNow login services.
Additivity	Option to disable sending logs to an appender attached higher in the hierarchy.

5. Click **Save**.

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Define a cross-origin resource sharing rule (CORS) to access ServiceNow API endpoints from AEM

Define a cross-origin resource sharing (CORS) rule on your ServiceNow instance to access endpoints of the Knowledge Management REST API, Case API, or CSM Attachment API from your Adobe Experience Manager (AEM) instance.

Before you begin

Ensure that you have configured the API for which you are defining the CORS rule.

- Activate the Knowledge API plugin (sn_km_api) to use the Knowledge Management REST API endpoints for knowledge articles. For more information, see Knowledge Management REST API.
- Activate the Case Management Core plugin (com.sn_customerservice) to use the Case API endpoints for customer service cases. For more information, see Case API.
- Configure the *`glide.rest.attachment_csm_api.allowed_tables`* system property and include the Case [sn_customerservice_case] table to use the CSM Attachment API end points for case attachments. For more information, see CSM Attachment API.

Role required: web_service_admin

About this task

Procedure

1. Navigate to **All** > **System Web Services** > **CORS Rules**.
2. Click **New**.
3. On the CORS Rule form, fill in the fields.

CORS Rule form

Field	Description
Name	Name for identifying your CORS rule.
REST API	REST API this CORS rule applies to. ○ For knowledge articles, select **Knowledge Management REST API [sn_km_api/knowledge]**. ○ For customer service cases, select **Case [sn_customerservice/case]**. ○ For case attachments, select **CSM Attachment API [now/attachment_csm]**
Domain	AEM instance that this CORS rule applies to.
Max age	Number of seconds to cache the client session.

4. In the HTTP Methods related list, select HTTP methods to send a request to a web service provider.
   - For knowledge articles, select **GET**.
   - For customer service cases, select **GET**, **PUT**, **POST**.
   - For case attachments, select **GET**, **POST**, **DELETE**.
5. For Case API, in the **Exposed headers** field of the HTTP Headers related list, enter `X-Total-Count`.
6. Click **Submit**.

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Customizing the colors of ServiceNow components in AEM

You can define the look and feel of the ServiceNow components in Adobe Experience Manager (AEM) by specifying colors for them.

As an AEM administrator, you can either modify the color variables preconfigured for all components or use the *initializeCSS* function for customizing the colors of a particular component using a custom CSS class. You specify the custom CSS class for a component in the **Custom CSS Class** property. For more information, see Display ServiceNow knowledge articles on an Adobe Experience Manager page and Display ServiceNow cases on an Adobe Experience Manager page.

Note: By default, the ServiceNow components are configured using the Bootstrap v4.4.1 CSS styles. If your AEM page uses a different Bootstrap version, the ServiceNow components style is overridden by the page style.

Modify the color theme for all ServiceNow components in AEM

Set the color theme for the ServiceNow components in Adobe Experience Manager (AEM) all at once by configuring the color variables.

Before you begin

Role required: AEM administrator

About this task

Note: By default, the ServiceNow components are configured using the Bootstrap v4.4.1 CSS styles. If your AEM page uses a different Bootstrap version, the ServiceNow components style is overridden by the page style.

Procedure

1. Open CRXDE Lite in your browser.
   For example, in your browser, enter the URL in the format `http://<AEM_hostname>:<AEM_port>/crx/de`. The default URL for CRXDE Lite is `http://localhost:4502/crx/de`.
2. Navigate to **apps** > **servicenow-components** > **clientlibs** > **clientlib-common**.
3. Open the `variables.less` file.
4. Configure the color variables available for the HTML elements in the ServiceNow components.

Color variable settings

Color setting	Variable
Text content	@text-color
Hyperlinks	@link-color
Badges	@badge-text-color
Badges background	@badge-background-color
Primary color for visual emphasis	@primary-color
Color complementary to the primary color, for visual emphasis	@secondary-color
Component titles	@title-color
Primary button text	@primary-btn-text-color
Primary button background	@primary-btn-bkg-color

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Color setting	Variable
Secondary button text	@secondary-btn-text-color
Secondary button background	@secondary-btn-bkg-color

Note: You specify a color for a variable in one of the following ways:

- Color name

  For example, `red`

- HEX value

  For example, `#FF0000`

- RGB value

  For example, `rgb(255,0,0)`

- *`var`* function

  Use the var function to specify a custom property for a color. For example, `var(--gray-dark)`.

5. From the CRXDE Lite menu, click **Save All** to save the changes on the AEM server.

Modify the color theme for a ServiceNow component in AEM

Override the color theme for a ServiceNow component in Adobe Experience Manager (AEM) by using the *`initialize`* function.

Before you begin

Role required: AEM administrator

About this task

The color variables you specify in the `variables.less` file are applied to all ServiceNow components in AEM. You can override the default colors for a particular component by setting the color variables for the component in the *`initializeCSS`* function.

Note: By default, the ServiceNow components are configured using the Bootstrap v4.4.1 CSS styles. If your AEM page uses a different Bootstrap version, the ServiceNow components style is overridden by the page style.

Procedure

1. Open CRXDE Lite in your browser.
   For example, in your browser, enter the URL in the format `http://<AEM_hostname>:<AEM_port>/crx/de`. The default URL for CRXDE Lite is `http://localhost:4502/crx/de`.
2. Navigate to **apps** > **servicenow-components** > **clientlibs** > **clientlib-common**.
3. Open the `variables.less` file.
4. Specify the *`initializeCSS`* function for a component in the format `<component_type>;<class_name>;<color_variable_1>;<color_variable_2>;<color_`

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- component_type: The type of the component on which you want to apply the custom color theme, for example, articlelist, articleview, casecards, and so on.
- class_name: The Custom CSS class you enter in the **Custom CSS class** property of your component.
- color_variable_1, color_variable_2, color_variable_n: The color variables you specify for the HTML elements in a component. For more information, see the Color variable settings table.

Use the following sample code as a reference for color styling at the component level.

```
.initialize(@componentType:articlelist;@className:now-article-l
ist;@text-color:red;
 @link-color:orange;@badge-text-color:blue;@badge-background-co
lor:yellow;@title-color:magenta;@secondary-color:indigo;);
.initialize(@componentType:articleview;
 @className:now-article-view;@text-color:red;
 @link-color:orange;@badge-text-color:blue;@badge-background-co
lor:yellow;@secondary-color:indigo;);
.initialize(@componentType:casecards;
 @className:now-case-cards;
 @text-color:red;@link-color:orange;@badge-text-color:blue;@bad
ge-background-color:yellow;@title-color:magenta;@secondary-colo
r:indigo;);
.initialize(@componentType:caselist;
 @className:now-case-list; @text-color:red;
 @link-color:orange;@title-color:magenta;@primary-color:green;@
secondary-btn-text-color:white;@secondary-btn-bkg-color:black
;);
.initialize(@componentType:searchbox;
 @className:now-search-box; @text-color:red;
 @link-color:orange;@title-color:magenta;@primary-color:green;@
secondary-btn-text-color:white;@secondary-btn-bkg-color:black
;);
.initialize(@componentType:searchresults;@className:now-sear
ch-results;@text-color:gray;
 @link-color:orange;@badge-text-color:blue;@badge-background-co
lor:yellow;@title-color:magenta;@secondary-color:indigo;);
.initialize(@componentType:caseview;@className:now-case-view;@t
ext-color:red;@link-color:orange;@primary-color:green;@seconda
ry-color:indigo;@primary-btn-text-color:blue;@primary-btn-bkg-c
olor:white;@secondary-btn-text-color:white;@secondary-btn-bkg-c
olor:blue;);
.initialize(@componentType:createcase;@className:now-create-cas
e;@text-color:red;@link-color:orange;@primary-color:green;@seco
ndary-color:indigo;@primary-btn-text-color:blue;@primary-btn-b
kg-color:white;@secondary-btn-text-color:white;@secondary-btn-b
kg-color:blue;)
```

5. From the CRXDE Lite menu, click **Save All** to save the changes on the AEM server.

ServiceNow pages in Adobe Experience Manager

Use pages provided on the ServiceNow site in the Adobe Experience Manager (AEM) as a reference to organize your AEM-based websites and provide a consistent user experience.

An AEM page houses containers, which in turn contain components. By manipulating the layout of the page and the components within it, you can construct a consistent user experience.

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By default, ServiceNow sites and pages aren't accessible to public users, which are anonymous AEM users who are not logged in. For information about how to publish them and make them available to anonymous AEM users, see the Adobe documentation topic Publishing pages.

ServiceNow page in AEM for knowledge articles

The following table shows default pages available in the ServiceNow site in AEM and the knowledge components available on these pages.

ServiceNow pages in AEM for knowledge articles

Page	Description	Knowledge components on the page
ServiceNow Article Search	Reference page to view knowledge article search results.	• Search Box • Search Results
ServiceNow Article View	Reference page to view a knowledge article.	Article View
ServiceNow Article List	Reference page to browse and search for knowledge articles.	• Search Box • Article List (one each for featured articles and the most viewed articles lists)

ServiceNow page in AEM for customer service cases

The following table shows default pages available in the ServiceNow site in AEM and the case components available on these pages.

ServiceNow pages in AEM for customer service cases

Page	Description	Case components on the page
ServiceNow Create Case	Reference page to create a customer service case.	New Case
ServiceNow Case View	Reference page to view a customer service case.	Case View
ServiceNow Case List	Reference page to browse and search for customer service cases.	Case List

ServiceNow home page in AEM

The following table shows default home page available in the ServiceNow site in AEM and the knowledge and case components available on this page.

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ServiceNow home page in AEM

Page	Description	ServiceNow components on the page
ServiceNow Home	Reference page to browse and search for knowledge articles and create a case.	• Article List • Search Box • Case Cards

Display ServiceNow knowledge articles on an Adobe Experience Manager page

Use knowledge components available within Adobe Experience Manager (AEM) to access knowledge bases from the ServiceNow instance and display associated knowledge articles on an AEM-based website.

Before you begin

- Activate the Knowledge API plugin (sn_km_api) to use the Knowledge Management REST API endpoints for knowledge articles. For more information, see Knowledge Management REST API.
- Define the cross-origin resource sharing (CORS) rule to access the Knowledge API from your AEM instance. For more information, see Define a cross-origin resource sharing rule (CORS) to access ServiceNow API endpoints from AEM.

Role required: AEM author

Procedure

1. Log in to your AEM instance.
2. Open your AEM page in Edit mode.
3. Open the components browser.
4. From the **All** list, select **ServiceNow**.
5. Drag a component to the required position on the page.

   Note: If components are not available, update your template configuration to include the knowledge components. In addition, you must modify the properties of the site template and add each knowledge article component to the list of allowed components.

6. Open the component dialog for editing.

   Note: By default, the knowledge components in the Edit mode of a page in AEM aren't accessible by public users, which are anonymous AEM users who are not logged in. To change the default behavior, you must enable the **Public** property for each knowledge component.

7. Set the Search Results component properties to display knowledge search results that include a list of knowledge articles from the knowledge bases in the ServiceNow instance.

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Search Results component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. Click **Add field** and enter the sys_id of a knowledge base. You can add multiple entries. **Note:** If you don't add a value, knowledge bases from the OSGi configuration settings are used for ServiceNow components.
Language	Enables the display of knowledge article search results in different languages. Select one of the following options: ○ **Select from ServiceNow OSGi Configuration**: Knowledge articles are displayed in the language configured in the OSGi configuration for ServiceNow components. This value is selected by default. ○ **Restrict to portal language**: Knowledge articles are displayed in the language configured in the AEM site. ○ **All languages**: Knowledge articles are displayed in all languages.
Search parameter	Parameter key for the search query. Example: `kb_query`
Secondary fields	Metadata of a knowledge article that appear with the article. Metadata include information such as the author, the date the article was last updated, and the date the article was last viewed. For multiple entries, separate the fields by commas. Example: `author,sys_view_count,sys_updated_on,rating`
Search results count	Maximum number of articles included in the search results list. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/NOWApp/now_article_view.html`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

8. Set the Search Box component properties to display a search box for users to enter search text and find knowledge articles in the ServiceNow instance matching the search text.

   Note: Triggering a search from the Search Box component leads to the Search Results component.

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Search Box component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Placeholder	Hint text displayed in the search box to provide information about what users can search for or conditions for the search text. Example: `Search (minimum three characters)`
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. Click **Add field** and enter the sys_id of a knowledge base. You can add multiple entries. **Note:** If you don't add a value, knowledge bases from the OSGi configuration settings are used for ServiceNow components.
Language	Enables the display of knowledge articles in different languages in the search box. Select one of the following options: ○ **Select from ServiceNow OSGi Configuration**: Knowledge articles are displayed in the language configured in the OSGi configuration for ServiceNow components. This value is selected by default. ○ **Restrict to portal language**: Knowledge articles are displayed in the language configured in the AEM site. ○ **All languages**: Knowledge articles are displayed in all languages.
Search page URL	Relative URL of the search page to redirect to. Example: `/content/NOWApp/now_article_search.html`
Search parameter	Parameter key for the search query. Example: `kb_query`
Typeahead	Option to enable typeahead search.
Typeahead search results count	Maximum number of articles to include in the typeahead search results list. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/NOWApp/now_article_view.html`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

9. Set the Article View component properties to display knowledge articles and their attachments, if available, from a ServiceNow instance.

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Article View component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Article parameter	Name of the URL query parameter for the article number. Example: `kb_article`
Secondary fields	Metadata of a knowledge article that appear with the article. Metadata include information such as the author, the date the article was last updated, and the date the article was last viewed. For multiple entries, separate the fields by commas. Example: `author,sys_view_count,sys_updated_on,rating`
Language parameter	Name of the URL query parameter containing the requested language for a knowledge article. Example: `kb_lang`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

10. Set the Article List component properties to display a list of knowledge articles depending on the list criteria.

Article List component properties

Property	Description
Public	Option to make the content of the component visible to public users. When selected, the knowledge articles available to unauthenticated users included in the component are available to all users, including public users.
Title	Title corresponding to the articles list that appears as the component header. Example: `Most viewed articles`
Knowledge Bases	System identifier (sys_id) of a knowledge base that contains associated knowledge articles. Click **Add field** and enter the sys_id of a knowledge base. You can add multiple entries. **Note:** If you don't add a value, knowledge bases from the OSGi configuration settings are used for ServiceNow components.
Language	Enables the display of a knowledge article in different languages when viewing the article. Select one of the following options:

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Property	Description
	○ **Select from ServiceNow OSGi Configuration**: Knowledge articles are displayed in the language configured in the OSGi configuration for ServiceNow components. This value is selected by default. ○ **Restrict to portal language**: Knowledge articles are displayed in the language configured in the AEM site. ○ **All languages**: Knowledge articles are displayed in all languages.
Secondary fields	Metadata of a knowledge article that appear with the article. Metadata include information such as the author, the date the article was last updated, and the date the article was last viewed. For multiple entries, separate the fields by commas. Example: `author,sys_view_count,sys_updated_on,rating`
Criteria	List of criteria for the knowledge articles list. Select one of the following options: ○ **Featured**: List of featured knowledge articles based on the keywords configured in the *`glide.knowman.default_keyword`* property. For information about featured articles, see Add a knowledge article to featured content and Knowledge properties. ○ **Most Viewed**: List of knowledge articles with the most views.
Article count	Maximum number of articles to include in the articles list. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than 1.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/NOWApp/now_article_view.html`
Hide component when empty	Option to hide the component when there are no knowledge articles to display.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

Display ServiceNow cases on an Adobe Experience Manager page

Use case components available within Adobe Experience Manager (AEM) to access customer service cases from the ServiceNow instance and display them on an AEM-based website.

Before you begin

Define the cross-origin resource sharing (CORS) rule to access the Case API and CSM Attachment API from your AEM instance. For more information, see Define a cross-origin resource sharing rule (CORS) to access ServiceNow API endpoints from AEM.

Role required: AEM author

About this task

The Case REST API enables you to create, retrieve, and update customer service case records. For more information, see Case API.

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The CSM Attachment API enables you to upload, download, and remove attachments associated with customer service cases and to retrieve attachment metadata. For more information, see CSM Attachment API.

Procedure

1. Log in to your AEM instance.
2. Open your AEM page in Edit mode.
3. Open the components browser.
4. From the **All** list, select **ServiceNow**.
5. Drag a component to the required position on the page.

   Note: If components are not available, update your template configuration to include the case components. In addition, you must modify the properties of the site template and add each case component to the list of allowed components.

6. Open the component dialog for editing.

   Note: The case components in the Edit mode of a page in AEM are accessible to all users, including public users. Public users are anonymous AEM users who are not logged in.

7. Set the Case Cards component properties to display all open customer service cases from your ServiceNow instance as column cards.

   Case Cards component properties

Property	Description
Title	Title of this component that appears on the AEM page.
Label parameters	Comma-separated label parameters for Case [sn_customerservice_case] table columns. Each parameter is specified in the format *label*:*column* . Where *label* is displayed on the component and *column* is the name of a column from the Case [sn_customerservice_case] table. Example: `Number:number,Priority:priority,Product:product`
Case list page URL	Relative URL of the case list page to redirect to. Example: `/content/servicenow/en/now_case_list.html`
Case view page URL	Relative URL of the case view page to redirect to. Example: `/content/servicenow/en/now_case_view.html`
Hide component for no cases	Option to hide the component when there are no cases to display.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

8. Set the New Case component properties for users to create a customer service case in your ServiceNow instance from your AEM page.

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New Case component properties

Property	Description
Title	Title of this component that appears on the AEM page.
Short description label	Label for the field to enter a brief description of the case.
Description label	Label for the field to enter a description of the case.
Product label	Semicolon-separated parameters to define the label and the placeholder text for the product list.
Asset label	Semicolon-separated parameters to define the label and the placeholder text for the asset list
Number of list items	Maximum number of items to include in the product and asset lists. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Show assets	Option to display the asset list on the component.
Case list page URL	Relative URL of the case list page to redirect to. Example: `/content/servicenow/en/now_case_list.html`
Case view page URL	Relative URL of the case view page to redirect to. Example: `/content/servicenow/en/now_case_view.html` **Note:** You need to enter a value for this property to navigate to the case view page from the Case created window.
Attachment file size limit in MB	Maximum size limit for an attachment file that can be added to a case.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

9. Set the Case View component properties to display customer service cases and any comments and attachments, if available, from a ServiceNow instance.

Case View component properties

Property	Description
Case parameter	Name of the URL query parameter for the case number. Example: `case_no`
Label parameters	Comma-separated label parameters for Case [sn_customerservice_case] table columns. Each parameter is specified in the format *`label`*`:`*`column`* . Where *`label`* is displayed on the component and *`column`* is the name of a column from the Case [sn_customerservice_case] table.

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Property	Description
	Example: `Number:number,Priority:priority,Product:product`
Activities count	Maximum number of activities such as comments and attachments to be displayed on the Activity tab. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Attachment file size limit in MB	Maximum size limit for an attachment file that can be added to a case. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`.
Article page URL	Relative URL of the article page to redirect to. Example: `/content/servicenow/en/now_article_view.html` **Note:** If an article link is included in a case, you need to enter a value for this property to navigate to the knowledge article view page from the case.
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

10. Set the Case List component properties to display a list of customer service cases.

Case List component properties

Property	Description
Title	Title of this component that appears on the AEM page.
Label parameters	Comma-separated label parameters for Case [sn_customerservice_case] table columns. Each parameter is specified in the format *`label`*`:`*`column`* . Where *`label`* is displayed on the component and *`column`* is the name of a column from the Case [sn_customerservice_case] table. Example: `Number:number,Priority:priority,Product:product`
Case count	Maximum number of cases to display on the component. Use the increment or decrement icons to increase or decrease the values. You can also manually enter a value. The value must be greater than `1`. The maximum value you can enter for this field is 50.
Show create case	Option to display the button to create a case on the component.
Create case button label	Label for the button to create a case.
Case create page URL	Relative URL of the case create page to redirect to. Example: `/content/servicenow/en/now_case_create.html`

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Property	Description
Case view page URL	Relative URL of the case view page to redirect to. Example: `/content/servicenow/en/now_case_view.html`
Custom CSS class	Custom CSS class for applying custom styles to this component. For more information, see Customizing the colors of ServiceNow components in AEM.

Integrating with Computer Telephony Integration (CTI)

Integrate Customer Service Management with Computer Telephony Integration (CTI). This integration enables the Customer Service application to support inbound and outbound telephone calls.

Starting with the Brazil release, the Computer Telephony Integration (CTI) plugin is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Customer service agents can do the following with CTI:

- Make an outgoing call to a phone number.
- Receive an incoming call from a phone number or from another user within the system.
- Transfer a call to another user within the system.
- Place a call on mute.
- Set their availability status.

CTI does not require any specific user role except the OpenFrame user (sn_openframe_user) role. Roles are based on the application using CTI.

For more information, see the following topics:

- Computer Telephony Integration
- Computer Telephony Integration workflows
- Interaction Controls Component (ICC) for voice calls

OpenFrame overview

OpenFrame provides a communication frame that customer service agents use to place and receive customer calls.

OpenFrame user roles

The OpenFrame window is available to agents who belong to one of the user groups specified in the OpenFrame configuration, and with any of the following roles:

- sn_openframe_user
- sn_customerservice_agent
- sn_customerservice.consumer_agent
- admin

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About OpenFrame

Use OpenFrame to integrate telephony systems into the ServiceNow AI Platform®. Use the OpenFrame API to communicate between the ServiceNow AI Platform and the domain opened in the OpenFrame window.

OpenFrame includes these components:

- TopFrame, a ServiceNow application.
- OpenFrame API, which gets sourced from the partner application. This API communicates with TopFrame and controls the OpenFrame visual features.

  The location of the API is `https://[servicenow instance]/scripts/openframe/1.0.5/openFrameAPI.min.js`. This minified version includes other needed libraries and should be used for integration.

  For API reference, you can use the unminified version: `https://[servicenow instance]/scripts/openframe/1.0.5/openFrameAPI.js`. This version can't be used directly for integration purposes.

Note:

- To stay current with reference to the OpenFrame library, use the following resource URI: `https://[servicenow instance]/scripts/openframe/latest/openFrameAPI.min.js`.
- To integrate softphone into the ServiceNow AI Platform using OpenFrame, add the third-party URLs of telephony services in the following property: *`glide.ui.concourse.onmessage_enforce_same_origin_whitelist`*. For more information see, Available system properties, and Enable URL allow list for cross-origin iframe communication in Instance Security Hardening Settings.

Using the OpenFrame window

OpenFrame provides support for embedded and contextual phone conversations, including:

- Context identification: Incoming calls maximize the OpenFrame window and display details about the caller, including the account, contact or consumer name, and phone number.
- Links to forms: Use the openFrameAPI (openServiceNowForm) to create links to forms. When an incoming call is received, an agent can select the account, contact, consumer, or case number in the OpenFrame window to open the corresponding record.
  - In Agent Workspace, records open in either a primary tab or a subtab depending on the tab configuration.
  - In the platform interface, records open in TopFrame (that is, the current page).
- Select-to-call capability: Click phone number fields to make a call.
  - In Agent Workspace, agents can select phone number fields on forms and in the Customer 360 ribbon component to make a call.
  - In the platform interface, agents can select the phone icon next to the **Contact** or **Consumer** fields.
    - If a contact or consumer has one phone number, the call is placed to that number.
    - If a contact or consumer has more than one phone number, a dialog box displays the available numbers. Select a number to place the call.
- OpenFrame window actions:

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OpenFrame window actions

User action	Description
Open the window	In Agent Workspace, select the phone icon: ○ In the navigation bar. ○ Next to the **Contact** or **Consumer** fields on the Case form. In the platform interface, select the phone icon: ○ In the banner frame. ○ Next to the **Contact** or **Consumer** fields on the Case form. With the admin role, you can configure the phone icon. For more information, see CTI integration with the Case form.
Hide the window	Select the **X** in the OpenFrame window header. **Note:** The OpenFrame window remains on top of other forms or pages until hidden.
Expand or collapse the window	Select the **+ / –** buttons in the OpenFrame window header (if **Enable collapsed view** is set to **True** in the OpenFrame configuration). **Note:** When collapsed, agents can still access call control actions.
Move the window	Select and drag the OpenFrame window header.

Using OpenFrame in CRM Workspace

In the CRM Workspace, you can:

- Integrate OpenFrame with the Interaction Management System (IMS) and interaction records. This enables agents to manage the phone interaction life cycle.
- Use the native voice control capability from the Interaction Controls Component (ICC) plugin to integrate to the contact center voice channel. You would need to be enable this in the CRM Workspace to manage the voice channel. For more information, see Interaction Controls Component (ICC) for voice calls and Interaction Controls Component (ICC) call features.

Creating an OpenFrame configuration

With the admin role, you can create or modify an OpenFrame configuration. This configuration stores information about the OpenFrame window settings, including:

- The window height and width.
- The icon, title, and subtitle displayed in the window header.
- Users and groups that have access to the window.

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Related topics

openFrameAPI - Client

Computer Telephony Integration Workflows

Computer Telephony Integration (CTI) enables customer service agents to place and receive phone calls in ServiceNow applications.

The following sample workflows show how CTI can be integrated with Interaction Management System (IMS) and OpenFrame (OF) to support outgoing and incoming telephone calls.

CTI integration for outgoing call

The following workflow describes the logical sequence of actions when an outgoing call is triggered using the OpenFrame window.

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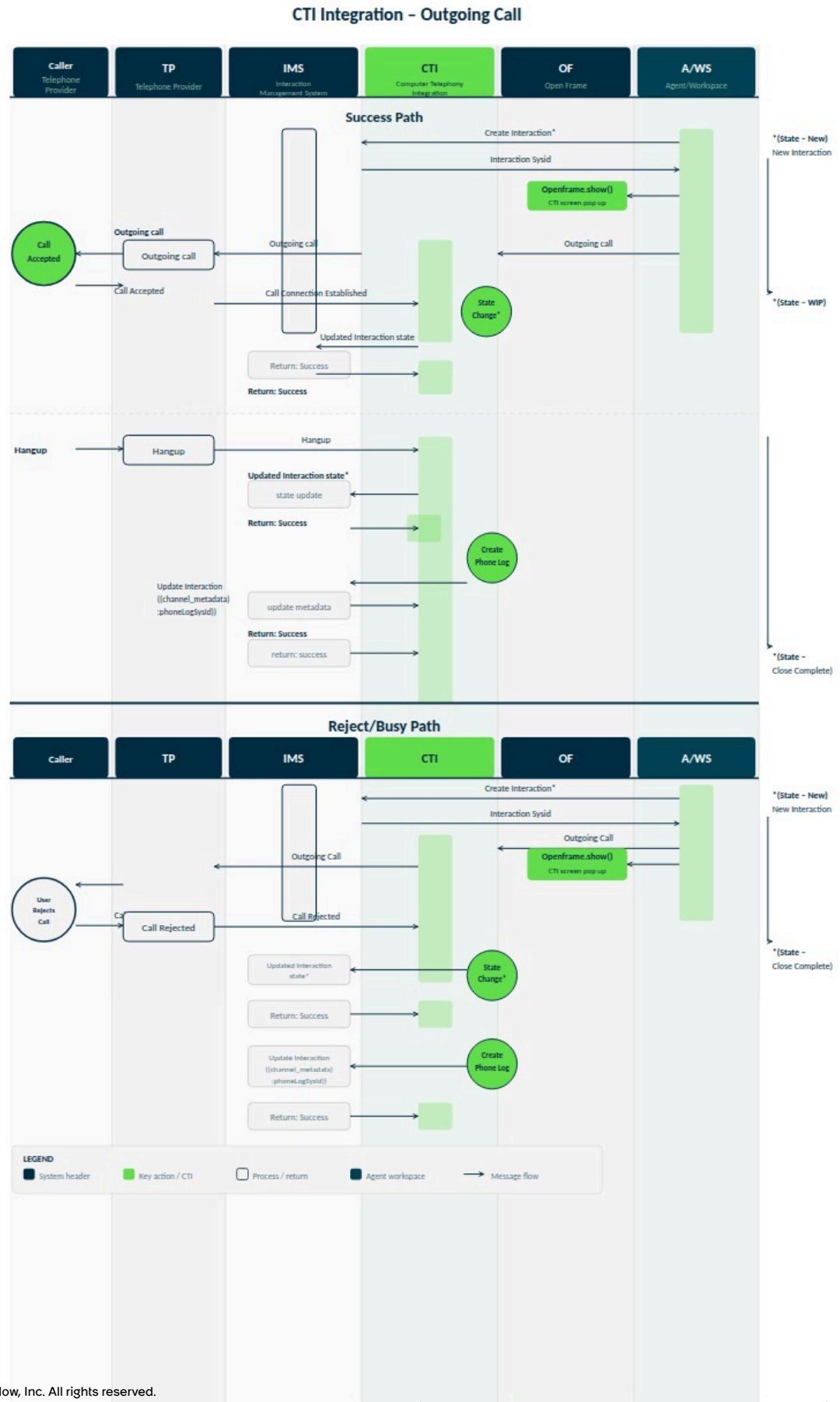
CTI Integration — Outgoing Call: Success Path & Reject/Busy Path



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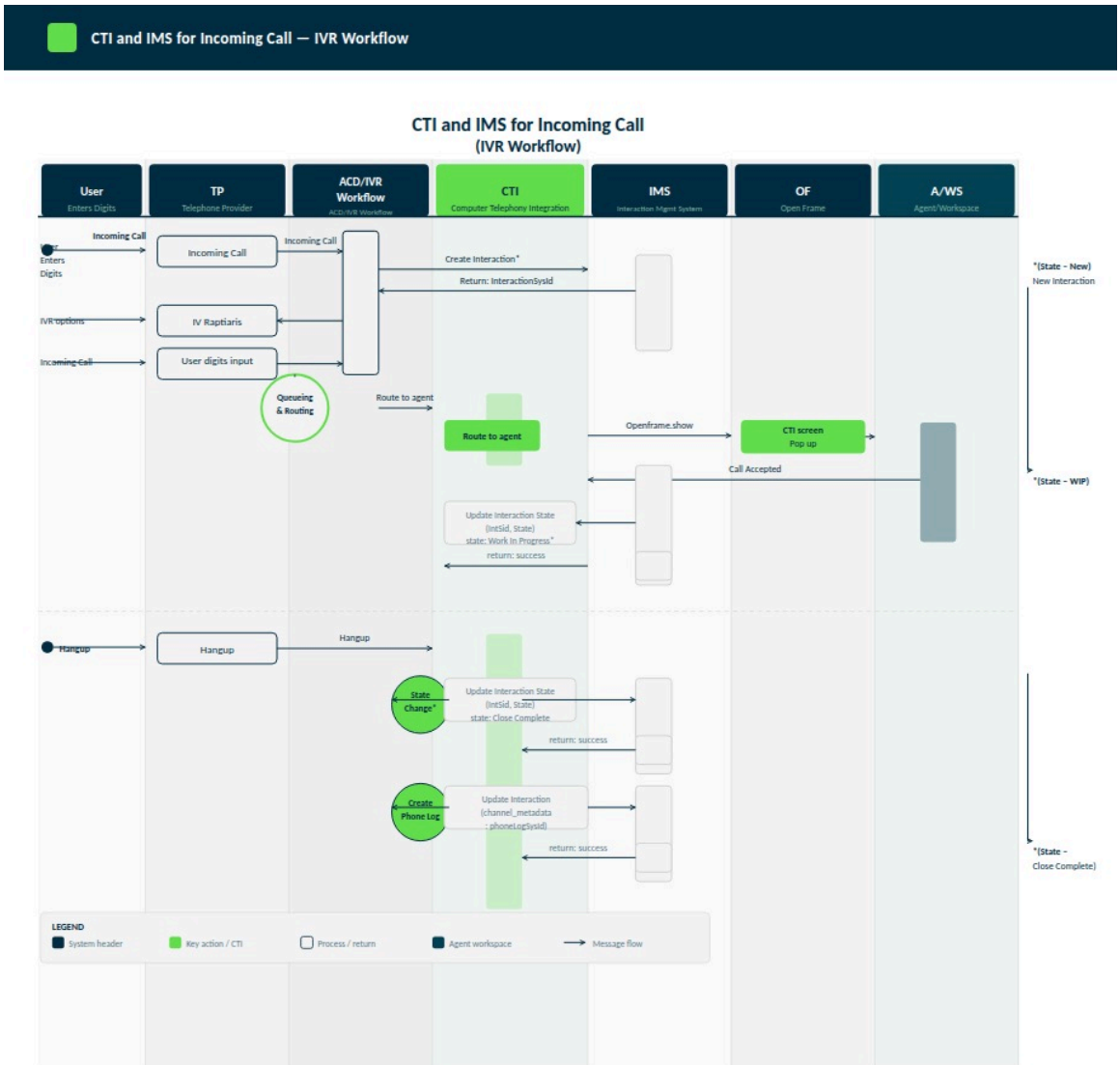
CTI integration for incoming call

The following workflow describes the logical sequence of actions when an incoming call is received using the OpenFrame window.



CTI integration for transferring call

The following workflow describes the logical sequence of actions when an incoming call is transferred to an agent.

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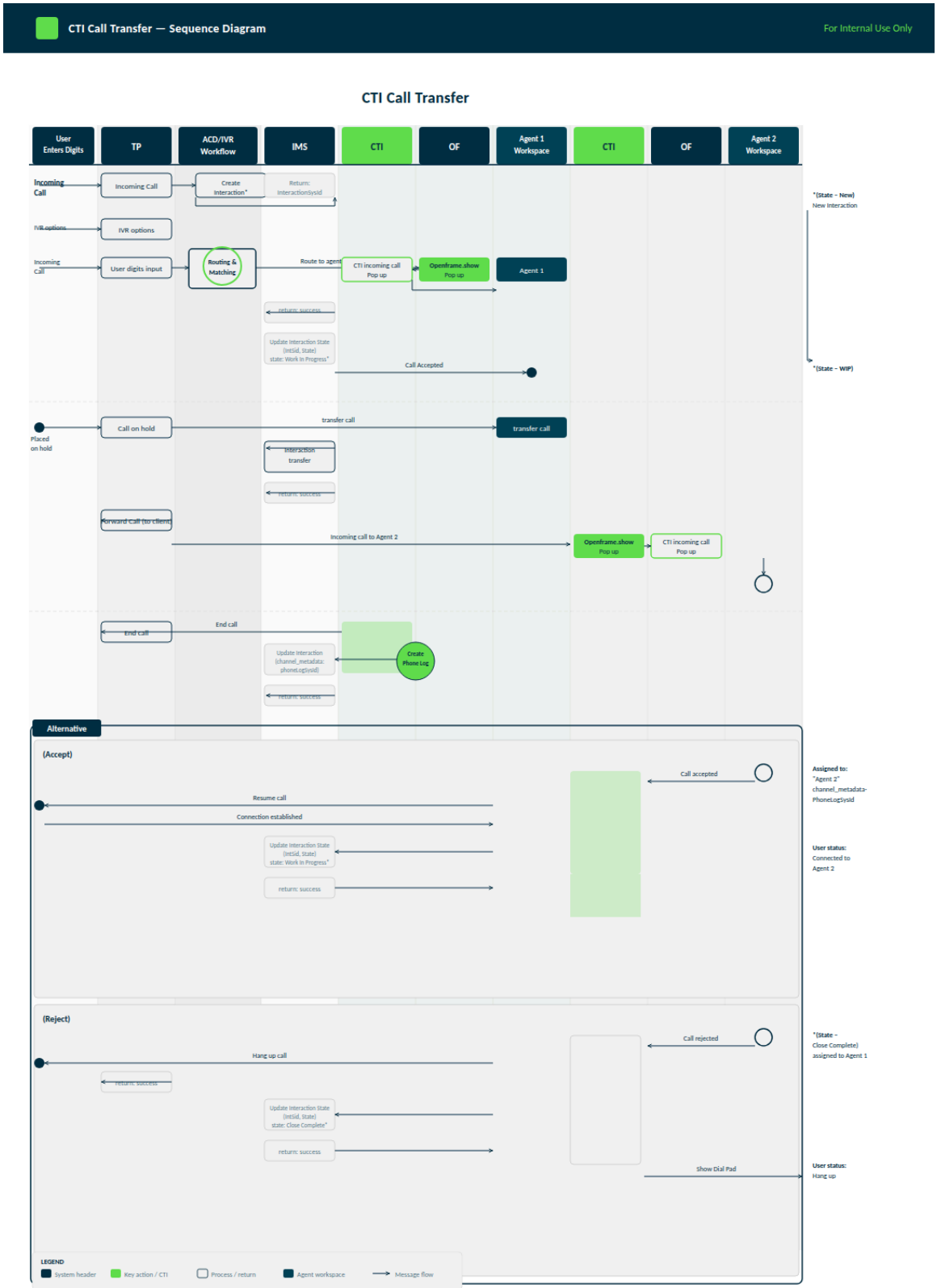

CTI call interactions operations

CTI integration with IMS and OF uses the `OpenframeInteractionUtility` script. You can use the`createOrUpdateInteractionForOpenframe` method from the utility script to create an interaction. For more information about creating interaction using APIs, see Interaction Management API.

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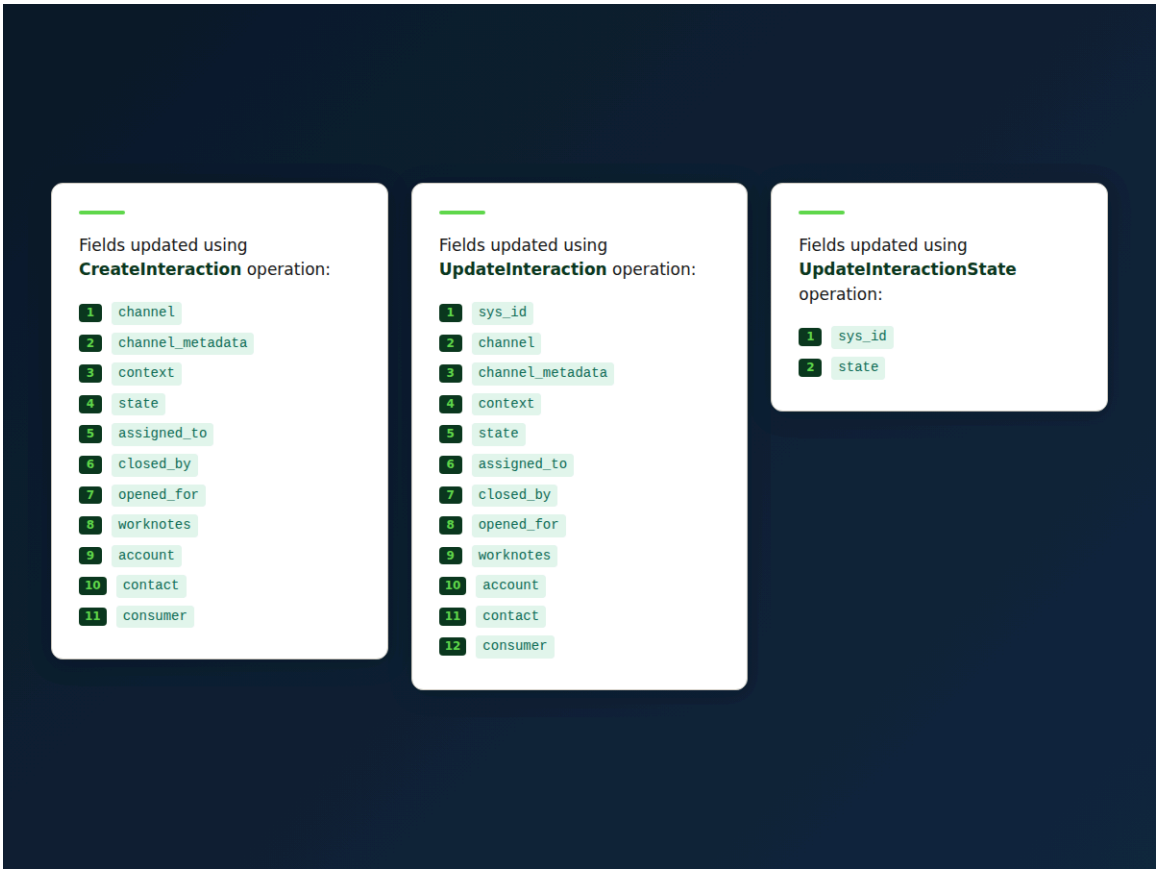

CTI demo implementation

Use the CTI demo implementation to test the phone communication channel between customer service agents and external customers in a non-production instance.

Starting with the Brazil release, the Computer Telephony Integration (CTI) plugin is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

The CTI Softphone plugin enables softphone functions and call center capabilities. This plugin provides integration between the ServiceNow platform and the Twilio Voice service using the Notify application. This plugin can be activated any time after activating Notify.

The CTI Softphone plugin includes one OpenFrame configuration, called CTI. This configuration specifies the necessary OpenFrame window settings as well as the URL to be launched within OpenFrame.

Note: The included CTI configuration does not have the **Default** field enabled. You must enable this field to use the CTI configuration as the default.

Configure the CTI demo

Activate and configure the Notify, CTI Softphone, Customer Service Management, and OpenFrame plugins to use the phone communication channel. These plugins must be activated and configured before the phone communication channel between customer service agents and external customers can be used. You must also set up a Twilio Voice account.

Before you begin

Role required: admin

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Procedure

1. Activate Notify (com.snc.notify).
2. Set up a Twilio Voice account.
   You can create an account at `https://www.twilio.com`.
3. Configure Notify with Twilio.
4. Activate the CTI Softphone plugin (com.snc.cti).
   If you want to load the demo data for CTI Softphone, you must also activate the Customer Service CTI Demo Data plugin (com.snc.customerservice_cti_demo). This demo data includes sample workflows.
5. Activate the Case Management Core plugin (com.sn_customerservice).
6. Activate the Openframe plugin (com.sn_openframe).
   Activating the Customer Service Management plugin automatically activates the Openframe plugin.
7. Create an OpenFrame configuration or use the default CTI configuration by enabling the **Default** field.

Working with the CTI using the OpenFrame window

Use the OpenFrame window to make a call, answer a call, transfer a call, or set status.

Answer an incoming call

Use the OpenFrame window to answer an incoming call.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

About this task

The OpenFrame window displays the incoming call, including the phone number and the customer contact or consumer information.

Procedure

1. Click **Accept**.
2. When the call is finished, click **End**.

Make an outgoing call

Use the OpenFrame window to make an outgoing call.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

Procedure

1. Select one of the following options.

Option	Description
Click the phone icon in the banner frame.	Enter the phone number in the **Number** field and click **Call**.
Click the phone icon next to the Contact or Consumer fields on the Case form.	Customer contacts and consumers can have multiple phone numbers.

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Option	Description
	○ If only one phone field is populated, a call is placed to that number. ○ If more than one phone field is populated, a dialog box displays the available numbers. Click the desired number to place the call and close the dialog box.

2. When finished with the call, click **End**.

Transfer a call

After accepting an incoming call, a customer service agent can transfer a call to another agent.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

Procedure

1. Answer an incoming call.
2. Click **Transfer**.
3. Select an agent from the drop-down list.
4. Click **Call**.

Set agent call status

Customer service agents can set their current call status.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_open_frame, or admin

Procedure

1. Click the phone icon in the banner frame.
2. Select your availability.

Option	Description
Available	The agent is available to take a call.
Not Available	The agent is not available to take a call.
Busy	The agent is currently on a call with a cus tomer.
Wrap Up	The agent is updating case information after completing a call.

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Option	Description
	After completing a call and the subsequent wrap up, an agent must manually change the status from **Wrap Up** to **Available**.

The **Presence** field in the **OpenFrame** > **OpenFrame Agent Presence** record is updated with the availability status set for the agent.

Computer Telephony demo integration with the Case form

Activating the CTI Softphone plugin enables call-related features on the Case form.

The customer service or consumer service agent can use the phone icon next to the **Contact** and **Consumer** fields on the Case form to make a phone call. The phone icon appears next to these fields if the entity record has at least one phone field (ph_number) and at least one of those phone fields contains a phone number.

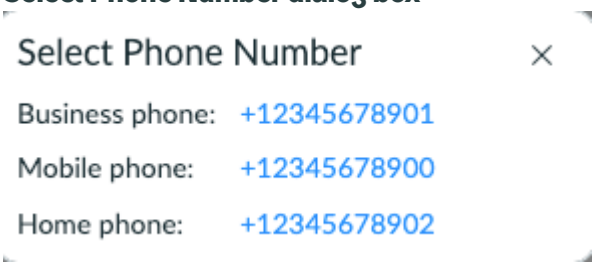
The phone icon is a reference contribution that can be added to any reference field by modifying the dictionary and adding the following attribute: *`ref_contributions=show_phone_customer_service`*.

Note: If you're using a third-party provided CTI application, then you can integrate with the show_phone UI macro to make calls. For more information on UI macros, refer to UI macros installed with OpenFrame

Select the phone icon to call a consumer or contact.

- If only one phone field is populated, a call is placed to that number.
- If more than one phone field is populated, a dialog box displays the available numbers. Select the desired number to call and close the dialog box.

Select Phone Number dialog box



Incoming and outgoing calls are logged in the Phone Log [sn_openframe_phone_log] table. Call details are recorded in the **Activity** field on the Case form and in the **Phone** related list.

CTI demo integration with case routing

An incoming call from a customer contact or a consumer can be routed to an available customer service agent.

Similar to the other communication channels, incoming calls from customer contacts and consumers can be routed to a specific agent by using matching rules. If an agent is not available, the call can be placed in a queue. After the agent is free, the matching call in the queue with the longest wait time is rerouted to the agent.

Case routing is enabled as an activity in a workflow. In the Call Center demo workflow (available with the Customer Service CTI Demo Data plugin), a call is forwarded to an agent after the caller either creates a new case or enters a valid number for an existing case.

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If no agents are available, the call goes into a queue and remains there until an agent becomes available. If a call is in the queue for longer than 10 minutes, it is forwarded to voice mail and the caller is asked to leave a message.

Related topics

Routing and assigning customer service cases

Computer Telephone demo integration with tasks

The CTI Softphone component can be integrated with other task entities on the ServiceNow AI Platform.

A workflow can be implemented to operate on the Incident table.

Note: The Call Center for Incident Management workflow, a demo workflow, is available with the Customer Service CTI Demo Data plugin.

Incoming or outgoing calls are logged in the Phone Log [sn_openframe_phone_log] table. The call logs also appear in the activity history of the task.

Associate a phone number with a workflow

You can associate a Notify phone number with a workflow.

Before you begin

You must create a Twilio Voice account and configure Notify with Twilio Voice before you can associate a phone number with a number group and workflow.
A number group allows you to group Notify phone numbers and then share workflows across grouped numbers. For each number group, you can specify a workflow for incoming and outgoing calls.

The CTI Softphone demo data includes these sample workflows:

- Call Center, for use with the Customer Service Management application
- Call Center for Incident Management

The Call Center workflow uses several Notify workflow activities that determine workflow functionality. Each activity performs a different task, such as playing a message greeting or creating a list of user input options. Activities can succeed or fail, which can result in actions performed by other activities.

You can use the default Call Center workflow or modify this work flow as needed.

Role required: admin

Procedure

1. Navigate to **All** > **Notify** > **Numbers**.
2. From the Notify Phone Numbers list, click the phone number that you want to edit.
3. Select a **Notify Group** that uses the incoming call workflow that you want to handle this phone number.
   The CTIDemo group uses the Call Center workflow for incoming calls.
4. Click **Update**.

Related topics

Numbers and number groups

Configure Notify with\n Twilio

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Interaction Controls Component (ICC) for voice calls

The ServiceNow® Configurable Workspace offers voice interaction and call control capabilities to agents within a single pane view. This enhances agent productivity and customer experience.

Overview of CRM Workspace with ICC integration

ICC integration with CRM Workspace enables agents to manage voice calls directly within their interaction screen using call controls. This feature helps reduce the need to switch between the contact center applications and the Configurable Workspace.

The CRM Workspace provides a unified interface that integrates contact center platform with the Customer Service Management (CSM) service offering. This integration helps you manage inbound and outbound interactions within a single interface.

See CRM Workspace.

With this expanded framework, voice interactions from a contact center platform and native digital channels can be routed seamlessly. Skills, queues, agents, and presence statuses can be synced automatically to optimize the admin experience and help reduce operational costs.

The following CCaaS Store Apps offer voice channel integration:

- Unified Experience from Genesys - Core
- Unified Experience from Genesys
- ServiceNow Voice for Amazon Connect

To enable this feature see Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations.

The following visual displays the voice workflow when CCaaS integrates with ICC within the CRM Workspace .

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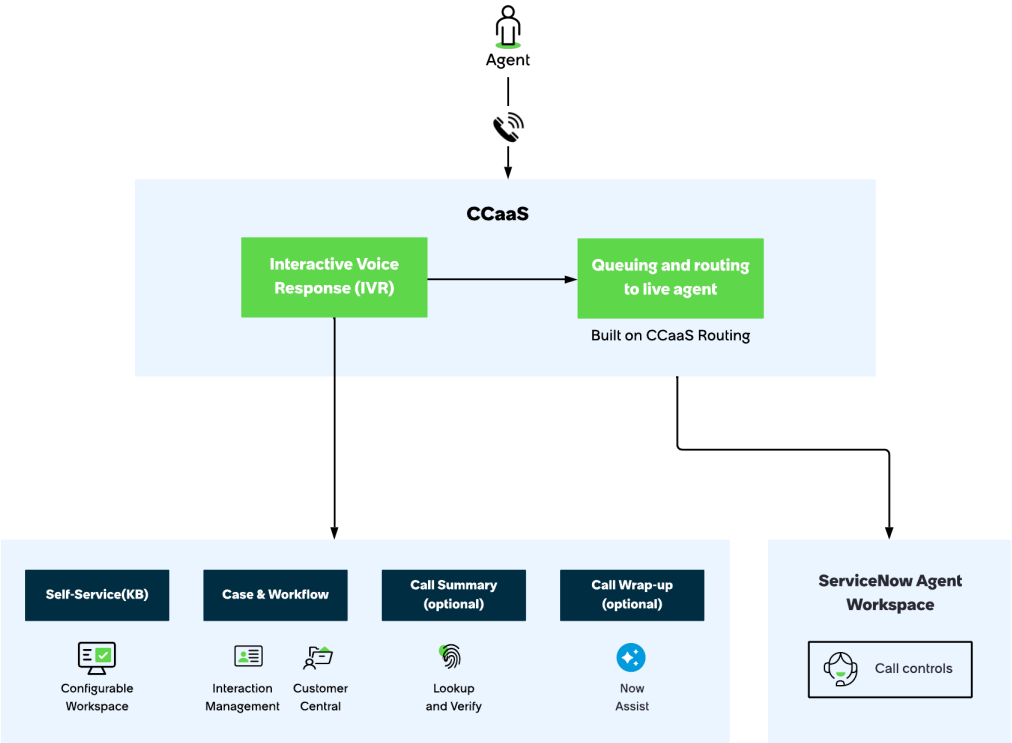

Key benefits

The primary benefits of this integration are as follows:

Centralized routing

Manages routing across departments and channels without switching interfaces.

Consistent agent experience

Promotes a consistent experience across all channels with a universal inbox.

Fast resolution

Helps reduce resolution time by reducing the need to switch between CCaaS and ServiceNow Workspace.

Enhanced efficiency

Streamlines workflows with direct access to consult and blind call transfer controls in the CRM Workspace.

See Interaction Controls Component (ICC) call features.

Interaction Controls Component (ICC) call features

Streamline call handling and enhance the agent experience in the Agent Workspace. Integrate voice call capabilities and the core contact center features with Interaction Controls Component (ICC).

The core features and capabilities of the contact center include:

- Voice interaction feature
- Intelligent routing
- Workforce engagement management (WEM)

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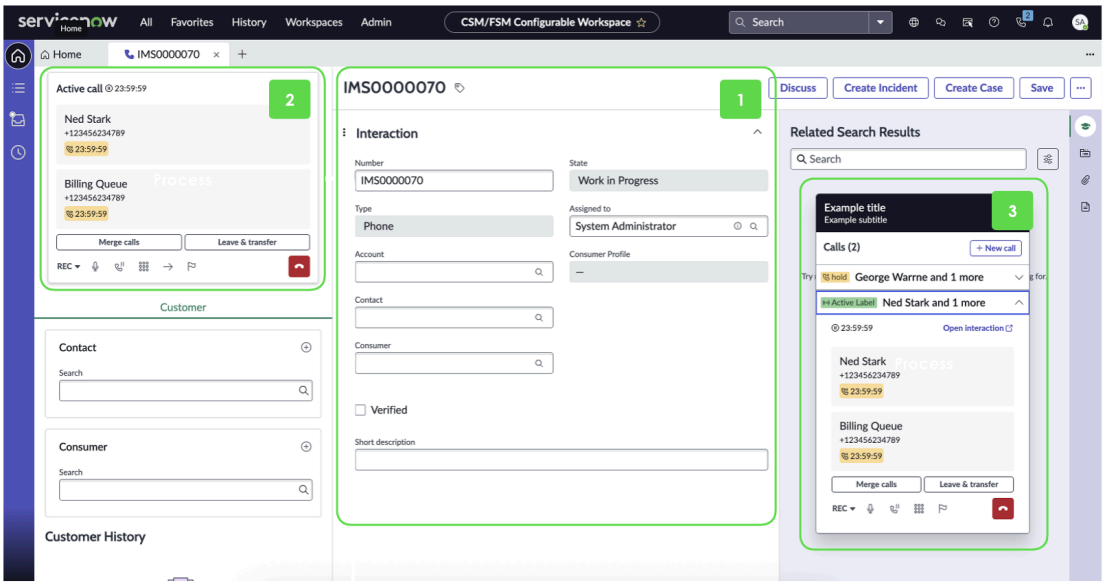
Note:

To use voice call capabilities available with Interaction Controls Component (ICC) integration, see Interaction Controls Component (ICC) for voice calls.

Use the ICC call control features with the existing contact center core features to promote streamlined operations and an enhanced agent experience. The following features are available within call interactions, and are numbered alongside the image as follows.

Overview of ICC call interaction features within CRM Workspace

ICC call features



The following table outlines the key call control features available when integrated with ICC within CRM Workspace.

Callout	Feature	Description
1	Interaction record	View an interaction record within the global call component in the supported workspace, such as CRM Workspace.
2	Active call component	Use the active call features to manage incoming, ongoing, and outgoing calls, which is available as an embedded component within the open interaction page.
3	Global call component	Enable agent movement between screens in the ServiceNow instance by displaying real-time call data in the component panel.

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Interaction record page features within the CRM Workspace

An interaction record is automatically created for each call. Opening the interaction record expands any voice interaction to show additional call details, including call transcript, wrap-up options, and customer context. The agent can view and update this record during the call and in the wrap-up interaction.

Note: You can use an identity property and extension point, to hide the conversation panel when real-time transcription is turned on or off. See: Show or hide the conversation panel

The Interaction record page contains several other features that can be used to assist agents resolve customer issues while on call. Description of these features, such as record information, customer history, and KB search are available in the next table. For feature information, see CSM voice interaction record page.

Agents can also view interaction record details in unsupported workspaces with the call resiliency capability. See: Call resiliency.

The Interaction records page surfaces capabilities that assist agents both during and after calls. The following table describes additional features that are embedded within the record page.

Feature	Description
Inbox alert card	When an inbound call comes through, choosing to accept or reject the call appears as an inbox notification. Manage inbound calls by accepting or rejecting them directly from the Agent Workspace. If an agent chooses to accept a call, they're navigated to the embedded active call window within the Interaction page.
Record information	An agent is able to view and update the record during their call. This section displays details of the task or case linked to the interaction. See CSM voice interaction record page.
Contact information	This section displays customer contact details, such as phone number and email. The agent can verify, identity, and use this information for follow-ups.
Customer history	Agents can open an overview of the customer and their interaction history, and also display a timeline of all previous agent interactions. The agent can use this context to identify recurring issues or follow up on earlier cases.
Troubleshoot and KB search	This feature surfaces relevant knowledge articles based on the call context. The agent can browse suggested content or manually search knowledge base articles to support troubleshooting.
Wrap up	Now Assist automatically generates a call summary and adds it to the interaction. The agent can review the summary, select either suggested or generated wrap-up codes from Now Assist, add additional notes, and end the interaction. **Note:** Enable the call transcription capability to implement this feature.

Active call component

Active call components are available via integration with ICC.

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The agent can monitor interactions and access them using the call control panel, which provides call control buttons such as record, mute, hold, and transfer (consult or blind). Additionally, real-time call data is shown, such as the call's associated interaction record, hold time, and call duration. Moving away from the interaction page to another area of the workspace automatically opens the global call component.

- Active call: When an agent is in an active call, the associated interaction record displays. Selecting the link opens the interaction record in a new tab. During an active call, you can use buttons to hold, start, or stop recording, mute yourself or other parties, and transfer calls to a queue, other agents, or external numbers.

  Overflow menu

  Access primary call controls (Recording, Hold, Mute, Transfer, and Help Request) directly on the active call interface. Additional CCaaS-defined actions are available through an overflow menu when controls exceed five or available display width is crossed. See Implement the overflow menu for active calls.

  Agent help request

  Agents get notified when a supervisor is coaching or has joined an active call while monitoring agents directly through the CCaaS system. See Agent help request for voice calls.

  Real-time availability update

  Agents get accurate availability status updates for other agents, supporting informed transfer decisions. Agent availability status updates in the transfer list and phone directory in real-time during call transfers.

  Agent-initiated call wrap-up

  Agents can initiate call wrap-up during an active call reducing reliance on post-call recall and shortening the time they spend on wrap-up tasks after the call ends. See Call Wrap-Up.

- Call transfer: Transfers calls using either consult or blind transfer methods. In a consult transfer, you can share the call context with the external contact before completing the transfer. A blind transfer immediately transfers the call to the external contact. Follow these steps to better assist a customer using the 'call transfer feature:

  Initiate call transfer

  Select the transfer icon on the active call component, which places the customer call on hold.

  Select Receiving agent

  Choose the agent to transfer the call to from the Agent's list.

  Choose transfer method

  Choose **Consult** or **Blind** transfer methods:

  - Use **Consult** to talk to the agent before transferring the call. You can **Merge** calls by combining your call with the new agent's call, or **Leave & Transfer** calls by disconnecting from the call and transferring the call directly.
  - Blind: Transfer the call directly without consultation.

  Blind: Transfer the call directly without consultation.

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Global call component

The global call component enables agents to access call controls and embedded functionality within any workspace that supports the ICC enabled call features. The global call components are available via OpenFrame integration. See: Global call list.

This component is used to make and manage outbound and incoming calls. Agents can switch between workspace anywhere within the application while taking ongoing calls. If an agent switches to a non-interaction tab during an ongoing call, the call continues to be active. All other active call controls can be accessed from this component.

- Outbound call: Initiates outbound calls to contact the customer. Use the phone keypad to dial manually, or select the call icon on the record phone field for direct calls. Avail the phone directory for ease of making outbound calls.

- ○ Callbacks: Outbound calls also support customer callback requests. When enabled and integrated within CSM, the agent can follow up on a callback request by manually completing an outbound call.

  Note: For more information on callbacks, view Callback interaction features

  ○ Phone directory: Agents can use the integrated address book to make outbound calls to queues, other agents, and external numbers. They can also enter a phone number directly in the global call list window to make calls. See: Phone directory.

Show or hide the conversation panel

Show or hide the conversation panel in the real-time transcription (RTT) interface using the *rtt_show_conversation_tab* identity property. This feature allows the contact center providers to control the visibility of the conversation panel using the identity property.

Configure and set up the conversation panel

Show or hide the conversation panel using the *rtt_show_conversation_tab* property:

- true – Displays the conversation panel
- false – Hides the conversation panel

Follow these steps to add the property to enable or disable the conversation panel feature in your application as follows:

1. Navigate to the provider application associated with your Interactions.
2. Create the property *rtt_show_conversation_tab*.

The **Call Transcript** tab doesn't show if the *rtt_show_conversation_tab* property is false or doesn't exist.

Global call list

Use the global call list capability enabled via OpenFrame integration. Access call controls to manage voice calls using the phone icon available in any workspace within your ServiceNow instance to ensure efficient call management without losing access to call controls.

Global call list overview

Enterprises can integrate with any third-party Contact Center as a Service (CCaaS) voice call capability within their ServiceNow instance. Using the global call list call controls, agents can initiate new phone calls by using the dial pad or phone directory and manage existing calls. This

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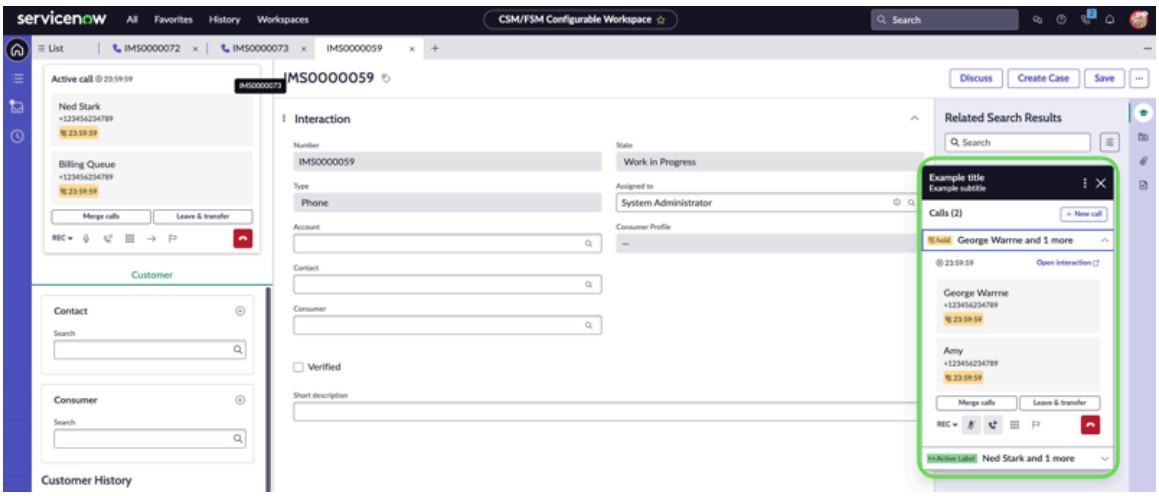
capability enables agents to access their contact details, queues, and other relevant information via integrated contact center.

Every call creates an interaction record with the call details, which can be accessed by selecting the **Open interaction** link in the call window. The interaction opens in a supported or unsupported workspace based on your integration settings. The feature allows agents to access and manage call controls from a phone icon, regardless of the workspace or tab they are in. Agents can move freely between tabs or other workspaces that don't support the call control capability.

The following screenshot gives you the context for the global call list view.

Global call list view



The global call list provides the following functionality:

Switching workspaces during active calls

Agents can switch between different workspaces while on an active phone call, ensuring continued access to necessary information and tools without losing call controls.

Accepting calls outside ICC supported workspaces

Agents can accept phone calls from workspaces even if they aren't integrated with the Interaction Controls Component (ICC) voice controls.

Navigating to supported workspaces

If the current workspace is supported, agents can select the **Open interaction** link from the voice control screen to open the interaction and display the details.

Improved call management

The badge on the phone icon keeps agents informed and helps them track the number of active phone calls. The feature is particularly useful in workspaces that do not support call controls, ensuring the agent can manage calls effectively regardless of the tab or workspace they are in.

Global call list scenarios

Before going over some typical scenarios, let's review certain terms for insight on the global call list feature:

Workspace terms	Definition
Current Workspace	Workspace the agent is currently on.

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Workspace terms	Definition
Supported Workspace	Workspace integrated with ICC call controls.
Unsupported Workspace	Workspace not integrated with ICC call controls.
Default Workspace	Workspace configured via OpenFrame enables agents to navigate to an ICC integrated workspace if they are in an unsupported workspace. See: Set default workspace for CCaaS.

Let's go over some scenarios to understand how an agent can switch between supported and unsupported workspaces while managing inbound and outbound calls:

Scenario 1

The global call list is available from an unsupported workspace, which allows the agent to accept and manage calls. The agent can accept a call and select the **Open interaction** link to open the interaction record in the default workspace.

Scenario 2

The agent is in an active call in a supported workspace, and during the call moves to an unsupported workspace. The call control is available to the agent via the phone icon in the global call list window.

Scenario 3

The agent selects the phone icon to open the phone dial pad to make an outbound call from an unsupported workspace. The related interaction record opens in the agent's current unsupported workspace. However, the agent must have default workspace configured to see the current call in the Interaction screen.

Note: See: Set default workspace for CCaaS.

Scenario 4

The agent can access and display the global call list from anywhere within the ServiceNow instance by selecting the phone icon. Selecting the Open interaction link displays the call details with the global call controls in their default workspace.

Note: The default workspace must be set by the contact center admin.

Scenario 5

The agent ends a call from an unsupported workspace. Selecting the interaction record links from the call that just ended or for other previous calls, displays in the same unsupported workspace the agent is in.

Global call list features

The feature streamlines the call handling experience for contact center agents. Agents can access call controls and manage calls while viewing other resources in supported or unsupported tabs in their ServiceNow instance.

From the global call list view, Agents can do the following:

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- Initiate new calls using either the keypad or the phone directory and view a list of queues, other agent names, and external contacts in the phone directory.
- Use Search in the phone directory to display a maximum list of 25 results at a time. The limit can be set by configuring the system property setting called *icc_search_limit* using an integer value. The default minimum value is 10, and a limit can be set to return a maximum of 25 results according to list of queues, agents, or external data.
- Use the phone icon next to the search input field to make outbound calls to an external number that doesn't display in the Queues, Agent, or External tab results.
- View and access call controls even when navigating to other tabs and screens. The global call list icon is available from supported and unsupported workspaces.
- View a badge count on the phone icon indicating the number of ongoing calls.
- Select the **Open interaction** link to open the interaction record details in their supported workspace in call resiliency mode. See: Call resiliency.

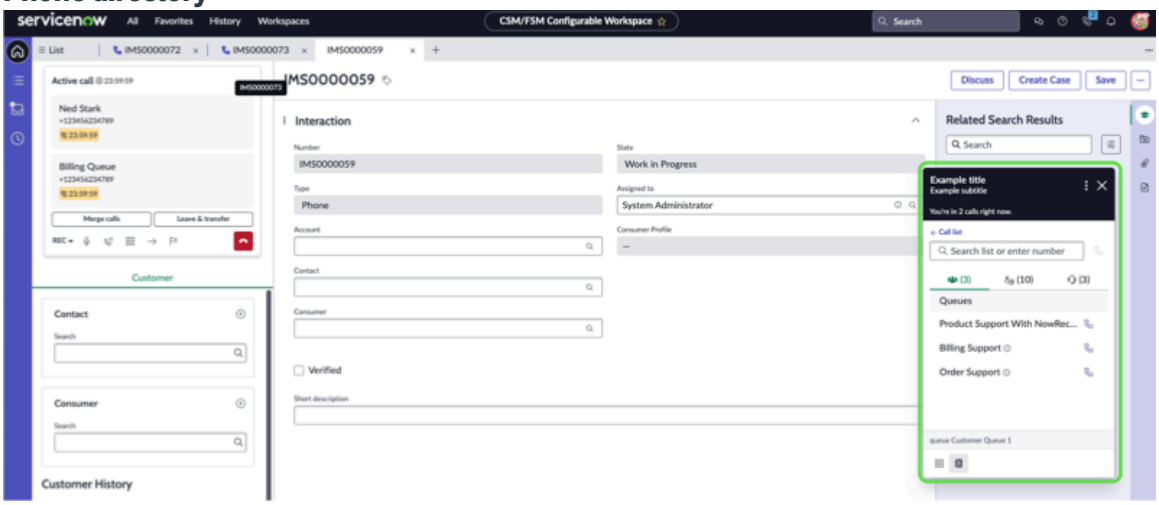
Note: The Transfer function isn't supported in the global call list feature.

Phone directory

The phone directory enables agents to make outbound calls to queues, other agents, and external numbers from their ServiceNow instance.

Phone directory overview

Phone directory



The phone directory helps agents make outbound calls to contacts within their organization and external numbers. Organizations can integrate with any third-party CCaaS call integration feature that enables agents to access their contacts and queues through their integrated contact center. The phone directory displays tabs for queue, agent contacts, and external contacts, and the contact center admin can configure the number of contacts displayed.

The contact center admin must enable and configure the phone directory for the agents to view and use it in their global call list from their ServiceNow instance. After the back-end integration is complete, the phone directory displays in CRM Workspace.

Configuration

The contact center admin can configure the number of contacts displayed in each tab of the phone directory. The number of search results displayed can be configured and limited using the *icc_search_limit* system property. This property controls the maximum number of search

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results returned when agents perform searches, ensuring that search performance remains optimal while providing agents with relevant contact options. The search limit can be configured to return a maximum of 25 results.

The following CCaaS Store Apps offer voice channel integration:

- Unified Experience from Genesys - Core
- Unified Experience from Genesys

For more information on ICC call features, see Interaction Controls Component (ICC) call features and Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations.

Phone directory Search

When a user performs a search in the phone directory search box, the system triggers a search event and exchanges data with your CCaaS provider. For example, when an agent enters a search query (such as "John") and initiates a search, the *getSearchTarget* event triggers and is sent to your integrated CCaaS system. The system processes the search request and returns a response containing the *searchTargetList* parameter, which is a list of contact records that match the search criteria. If the *icc_search_limit* is set to 10, the *searchTargetList* will return up to 10 contact records matching the agent's search. The following diagram illustrates the technical interaction between the phone directory, the *getSearchTarget* event, and the CCaaS system.

For details on the s*earchTargetList* parameter, see openFrameAPI - setICContext(String Type, Object <Context>).

The following example shows how to subscribe to the **interaction_control_action** event.

```
openFrameAPI.subscribe("interaction_control_action", function(action) {
    // Can perform the action based on the name
    if (action.name == "mute") {
        mute();
        openFrameAPI.setICContext("activeCall", context); // Update context representing the change
    } else if (action.name == "getSearchTarget") {
        action.payload.searchType == "queue" ? fetchQueueTransferList(action.payload.searchTerm) : fetchAgentTransferList(action.payload.searchTerm);
        openFrameAPI.setICContext("searchTargetList", context); // Call context will have the transfer list
    } else if (action.name == "logout") {
        logout();
        openFrameAPI.showIframe(); // Show iframe api
    }
});
```

For documentation on the search events and response structures, see the following OpenFrame API resources:

getSearchTarget

openFrameAPI - subscribe(openFrameAPIEVENT event, function eventCallback)

searchTargetList

openFrameAPI - setICContext(String Type, Object <Context>)

Call resiliency

Call resiliency for Contact Center as a Service (CCaaS) delivers phone calls to Agent Workspaces without creating an Interaction in the ServiceNow instance. This capability verifies uninterrupted and reliable call management.

Call resiliency for contact center integration overview

Call resiliency for CCaaS voice call integration ensures that inbound calls are delivered to agents. Inbound calls are delivered even if there are issues with creating Interactions in the ServiceNow instance. This feature routes phone calls to agents without requiring an Interaction.

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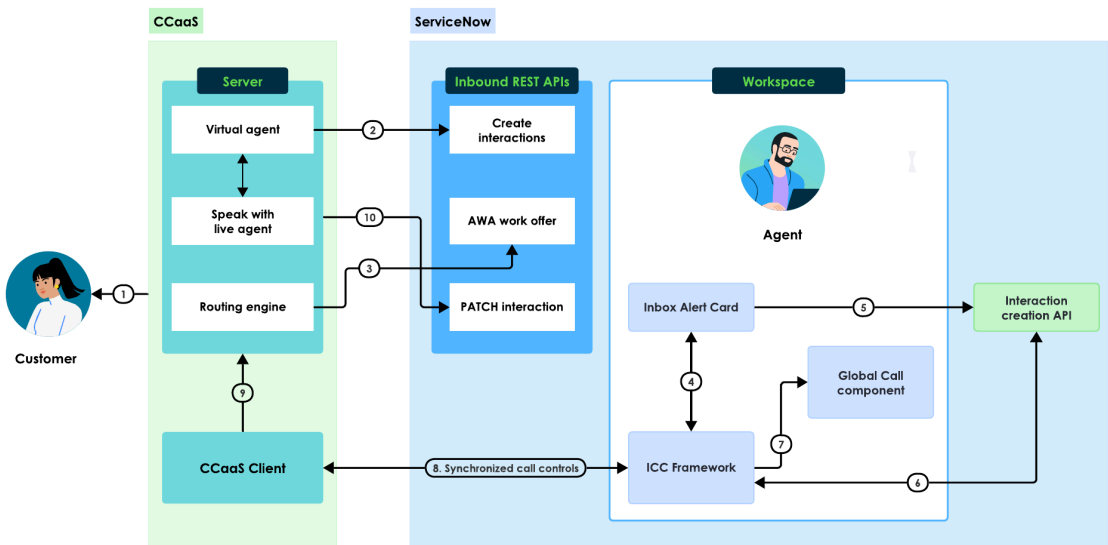
When an agent accepts a call, an Interaction and a phone log record are created. If an agent rejects the call or the call times out, the contact center redirects the call to the next available agent. The integrated contact center, using the Interaction Controls Component (ICC) capability, displays call data such as the phone number and call duration, and provides basic functions such as mute, hold, and disconnect. Agents can open interactions by clicking the **Open interaction** link, although call transfer isn't possible without an Interaction record. This approach ensures seamless call handling and minimizes service disruptions.

The following call resiliency visual gives you a snapshot of the end-to-end workflow.

Call resiliency flow



Refer to the following table for annotation description of the preceding image.

Annotation	Description
1	Incoming call
2	Create voice interaction
3	Offer voice call option to the agent
4	Agent can accept/reject a call
5	When agent accepts a call, a voice interaction is created
6	Notification is sent to OpenFrame for the successful creation of an interaction
7	Global call screen displays
8	Synchronized call occurs continuously from steps 6 to 9. Once the agent accepts a call, any action the agent takes gets synced between ServiceNow and CCaaS
9	Conversation gets updated in the interaction
10	Interaction record gets updated

Call resiliency workflow use cases

Let's go over some use cases to understand how call resiliency works for an integrated contact center.

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In the call resiliency mode, calls are delivered to the Agents without interruption to call control options such as accept, hold, mute, or move calls to queues.

Accept/Auto-accept calls

Agents can accept or auto-accept calls seamlessly in the call resiliency mode even without creating an Interaction. If an Interaction record doesn't get created, the agent has the option to create one by manually clicking the **Open interaction** link during the live call.

Reject call

When a customer makes an inbound call, in the resiliency mode, CCaaS delivers the call to the agent's workspace. If the agent clicks **Reject**, the system generates an event. The event is communicated to the contact center, which in turn redirects the call to the next available agent. The contact center takes necessary actions to ensure seamless service delivery. This process verifies that the system is aware of the agent's action and can respond appropriately to maintain efficient call handling.

Call timeout

If a call times out, call resiliency promotes ensures efficient interaction management by automatically creating an interaction and a work item. This process guarantees that, even if a call times out, the necessary interactions and work items are generated and managed effectively that enables contact centers to maintain seamless service delivery.

Key Benefits of call resiliency

The call resiliency workflow improves the efficiency and reliability of handling incoming calls in a contact center. The following are some benefits:

Enhanced reliability

Calls are delivered to agents even if interaction creation fails, promoting prompt handling and continuous service.

Efficient call handling

The 'Offer API' creates interactions after the agent accepts the call, reducing wait time.

Call management flexibility

Agents can reject or let calls time out, and the system redirects them to the next available agent, promoting no call is missed.

Comprehensive call data

The ICC call controls display essential call information, such as phone numbers and duration, aiding effective call management.

Limited functionality for seamless operations

Agents can perform basic functions such as mute, hold, and disconnect, maintaining smooth call operations even in resiliency mode.

On-demand interaction creation

Interactions are created after the agent accepts the call, promoting all necessary records are generated without delay.

Improved Agent experience

A clear and efficient workflow enhances the agent's experience, making call and interaction management easier.

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Call Wrap-Up

Call wrap-up enables agents to open the wrap-up modal, select wrap-up codes, and submit summary notes during an active call. Call context is captured in real time.

Call Wrap-Up overview

Agent-initiated wrap-up extends the *Interaction Controls Component (ICC)* to give agents direct control over the wrap-up workflow during an active call. Traditionally, wrap-up is triggered automatically after a call ends. This feature changes that model by allowing agents to open the wrap-up modal while the call is still in progress.

When an agent selects **Open Wrap-Up** in the active call controls, the CCaaS platform receives a wrap-up event and returns the appropriate wrap-up codes for that call. The wrap-up modal opens in the agent's Workspace, where the agent can select a wrap-up code and enter summary notes and comments. The submitted data is saved to the system of record immediately, even while the call remains active.

Agents handling complex or sensitive calls can use this feature to record context as it happens rather than rely on post-call recall. This reduces the risk of incomplete or inaccurate notes. Agents can also initiate wrap-up for call flows that do not have mandatory wrap-up configured, ensuring that notes and codes can be submitted regardless of call type.

Agent-initiated wrap-up is available when the *ICC* for voice is integrated and the CCaaS administrator has configured and enabled the feature in the ServiceNow instance.

For more information, see Interaction wrap up and Create an interaction wrap-up configuration.

Benefits

Agent-initiated wrap-up provides the following benefits:

Real-time context capture

Agents can record wrap-up codes and notes during the call, reducing reliance on post-call recall and improving the accuracy of submitted data.

Reduced after-call work time

Submitting wrap-up data before the call ends shortens the time agents spend on wrap-up tasks after the call disconnects.

Improved note accuracy

Agents handling complex or sensitive calls can document context as it happens, reducing the risk of incomplete or inaccurate notes.

Implement the overflow menu for active calls

Configure the toolbar layout order for the active call component so that call control buttons exceeding the available toolbar slots appear in the overflow menu.

Before you begin

Identify the list of call control buttons to enable and their intended display order.

Role required: contact center admin

About this task

The toolbar on the active call component displays a maximum of six call control buttons. When recording is enabled, the recording button anchors in the first position, reducing the available

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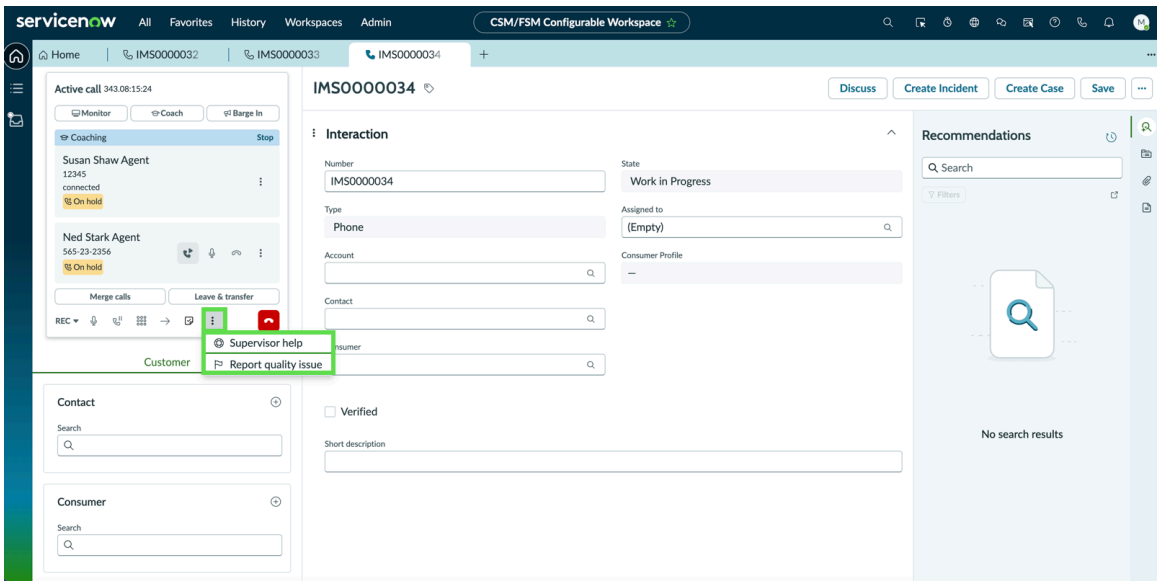
slots to five. When the number of enabled buttons exceeds the available slots, the system renders the remaining buttons in the overflow menu. If all enabled buttons fit within the toolbar slots, no overflow button appears.

Note: The overflow menu appears only on the active call component within the interaction record. It does not appear in the global call component.



Procedure

1. In UI Builder, open the active call component for your workspace.
2. Locate the *toolbarLayoutOrder* client state parameter and set the button order using the values in the following table.

   The default button order in *toolbarLayoutOrder* matches the table. You can update the order in UI Builder.

Button label and toolbarLayoutOrder values

Button label	*toolbarLayoutOrder* value
Mute	`mute`
Hold	`hold`
Keypad	`dtmf`
Transfer	`transfer`
Agent Initiated Wrap-Up	`wrapUpInitiated`
Supervisor Help Request	`help_request`
Report Quality Issue	`flag`

Note: If your implementation includes recording, the recording button is first and cannot be repositioned. Adjust *toolbarLayoutOrder* and the button order in UI Builder together to keep them in sync.

Two buttons have specific conditions:

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- **Supervisor Help Request** is always available from the overflow menu but is inactive when a request is active. Agents can request supervisor assistance but must end or cancel it from the modal at the top of the active call component participant section.
- **Open Wrap-Up** appears only when enabled. Agents use it to complete post-call wrap-up tasks.

3. In UI Builder, set the button order to match the sequence defined in *`toolbarLayoutOrder`*. Keeping both settings in sync prevents the recording button from being repositioned.
4. Select **Save**.
5. Confirm the overflow menu behavior by initiating a test call.

   Buttons exceeding the toolbar slot limit appear in the overflow menu on the active call component.

   Note: Buttons in the overflow menu behave similarly to their toolbar counterparts, for example, Mute, Hold, Report Quality Issue, and Open Wrap-Up each disable briefly after being selected.

   The overflow menu icon appears on the active call component toolbar.

Result

The active call component toolbar is configured. Call control buttons that exceed the available slots are accessible from the overflow menu within the interaction record.

Monitoring calls

Call monitoring is a feature in the Contact Center as a Service (CCaaS) solution that enables supervisors and managers to observe, monitor, and analyze customer interactions.

Contact centers integrating with ServiceNow's native voice call capability via Interaction Controls Component (ICC) and OpenFrame have the option to enable the call monitoring feature, embedded in their CRM Workspace.

See .

Key benefits of call monitoring

Some of the key advantages of enabling this feature are as follows:

- Provides real-time feedback to agents, helping them improve their interactions.
- Identifies training needs for agents.
- Promotes consistent quality of customer interactions.
- Offers insights into customer preferences and sentiment, influencing strategic decisions.

Core functionality of call feature

Monitor:

Enables supervisors to listen-in to live calls for training and compliance.

Coach:

Enables supervisors to support agents during live calls via:

- Coach, where the supervisor privately coaches using a one-way whisper feature enabling the supervisor to provide guidance that only the Agent can hear.
- Barge in, where the supervisor joins the call as a participant and can speak with both the agent and customer.

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Supervisor call monitoring

Supervisors can monitor live customer interactions and respond to agent help requests by listening-in, coaching, or barging-in to calls. All supervisor actions taken after accepting a **Help Request** from an agent are logged with timestamps for audit and reporting.

Supervisor call monitoring overview

Supervisors can accept help requests from agents and take the following actions from their workspace:

- Monitor (silent)
- Coach
- Barge In

Each action taken after a **Help Request** is accepted and recorded with a timestamp. The feature supports Chat, Messaging, and Voice interactions and integrates with conversation-monitoring and supervisor dashboards. Supervisors receive notifications when:

- A **Help Request** is assigned to them
- An agent cancels a **Help Request**

For more information, see:

- Manager Workspace landing page
- Manager Workspace landing page
- Listen, Monitor or Barge in to an agent call

Dependencies

Enable the following capabilities to view and use the call monitoring features in the Active call and Global call list:

Contact Center as a Service (CCaaS) integration:

Contact centers must enable the call monitoring capability when integrating with the native call controls via Interaction Controls Component (ICC) and OpenFrame.

Native call controls must be available through ICC and OpenFrame.

ICC must support supervisor action controls.

Role-based access and permissions:

Supervisors must have the#awa_manager role.

When a supervisor with the awa_manager role views an interaction, the CCaaS is notified and configures the call controls accordingly.

UI controls:

On enabling the feature, the action buttons for Monitor, Coach, and Barge In display as actionable icons on the supervisor's call interface.

Supervisors can leave a call using the Disconnect button.

Help Request data model

Each supervisor action triggered through a **Help Request** is logged with a timestamp.

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The system tracks the **Help Request** status and supports Search for audit and analytics.

Supervisor actions are scoped to the relevant tenant or domain.

Analytics integration

Reporting modules must be integrated to capture supervisor action data.

Feature availability depends on product and license purchase.

Workflow

The following steps define a typical workflow for a supervisor-initiated call monitoring:

1. The supervisor views a dashboard of active calls and agent interactions. They can select an active interaction and choose to monitor, coach, or barge in, depending on the scenario and their permissions.
2. If an agent submits a **Help Request**, the supervisor receives a notification and selects #**Confirm**#o accept it.
3. After acceptance:
   - Available actions are enabled.
   - The **Help Request** status changes to#n Progress.
   - The#HelpProvidedBy field is set to the supervisor.
4. The supervisor can disconnect from the call at any time.
5. The agent can close the **Help Request** during the session and submit a new one as required.

Note: Silent monitoring isn't visible to the agent.

Scenarios

Scenario 1: Supervisor accepts a Help Request:

After a supervisor accepts a **Help Request**:

- Monitor, Coach, and Barge In options are enabled in the Active Call window.
- The **Help Request** interaction flag in the system is set to false.
- The **Help Request** status updates to#n Progress.
- HelpProvidedBy in the system is set to the accepting supervisor.

Scenario 2: Agent closes a Help Request:

While a **Help Request** is in progress, the agent can close it:

- The **Help Request** button updates to enable agents to close the request.
- The system records the closed status.
- A confirmation alert displays.
- The agent can submit a new **Help Request** after closing a current one for additional help with the same call, or for a new one.

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Agent help request for voice calls

Agents can request supervisor assistance during active customer calls by submitting help requests with context and reason. They receive real-time notifications when supervisors coach or barge in to help them resolve customer issues.

Agent help request overview

The help request feature lets agents request supervisor assistance during active calls. Agents can submit help requests with specific reasons and comments to provide context before the supervisors respond. They receive real-time notifications when supervisors join the call. Agents can cancel help requests anytime before a supervisor engagement. All help request events are recorded for reporting and analysis.

The following are some key functionality:

- Submit help requests with customizable reasons and comments
- Cancel help requests before supervisor engagement if the issue resolves
- Receive notifications when supervisors coach or barge in on your call
- View supervisor name and phone number with clear **Coaching** or **Barge In** labels
- Track help-request metrics including reason, frequency, duration, and supervisor involvement
- Automatically cancel help requests when completing Consult or Blind transfer actions
- Configure phone directory to show or hide Agents, Queues, or External tabs based on CCaaS provider settings. Agents see tabs enabled by the CCaaS provider, preventing transfers to unsupported numbers.
- While handling a customer call, agents can now see accurate availability status for other agents, supporting informed transfer decisions. Agent availability status updates in the transfer list and phone directory in real-time during call transfers.

Dependencies

Enable the following capabilities to view and use the call monitoring features in the Active call and Global call windows:

- Enable the call monitoring capability when integrating with the native call controls via Interaction Controls Component (ICC) and OpenFrame.
- Engage in an active call.
- Configure the integration with the CCaaS platform for voice controls and supervisor actions.
- Enable real-time UI update capability.
- Configure a reporting infrastructure to capture help request metrics.

Persona:

Agent:

Submits help requests during active calls to receive supervisor assistance.

Supervisor/Manager/Coach:

Responds to help requests and performs coaching or barge in actions with appropriate permissions.

Review the following scenarios to understand how the feature works.

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Submitting a help request

Follow these steps to submit a help request to your supervisor when you require assistance during an active call:

1. Select the **Help Request** button on the call interface.
2. Provide a reason and brief description of the issue in the dialog screen.
3. Select **Submit** to send the request to the supervisor.

Canceling a help request

Follow these steps to cancel a help request, if the issue is resolved before the supervisor intervenes.

1. Locate the **Help Request** button on the call interface.
2. Select **Cancel**.
3. Select **Yes** to confirm the cancellation in the dialog screen.

Monitoring conversation

Supervisors may follow these steps to provide silent monitoring during voice calls:

1. Receive a help request from the agent, which opens the Interaction to establish the voice connection.
2. Select **Monitor** in the supervisor Workspace.
3. Listen to the conversation between the agent and customer.

> **Note:** During silent monitoring, the agent and customer aren't aware that the supervisor is in the listen-only mode.

Supervisor coaching

Supervisors can follow these steps to provide coaching to agents during voice calls.

1. Receive a help request from the agent, which opens the Interaction to establish the voice connection.
2. Select **Coach** in the supervisor Workspace.
3. Provide coaching by talking to the agent, as the agent is in a listen-only mode during the coaching.
4. Select **Send** to deliver the coaching to the agent.

Barge In participation

Supervisors can follow these steps to participate in a voice call when an issue requires immediate attention.

1. Receive a help request from the agent, which opens the Interaction to establish the voice connection.
2. Select **Barge In** in the supervisor Workspace.
3. Join the call and provide the necessary assistance to the agent and the customer.
4. Select **End Barge In** when the issue is resolved.

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Note: Once a voice connection has been established with an Interaction, the supervisor can go through all or one of the preceding actions. An action must be completed before attempting a new one.

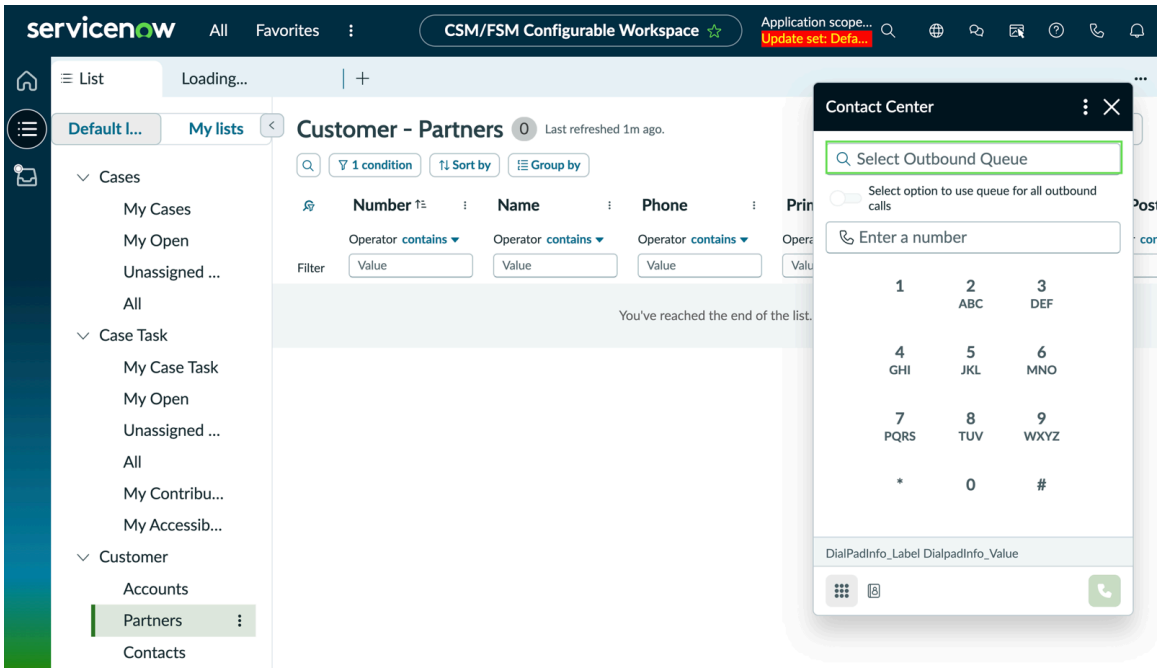
Queue selection for outbound calls

Queue selection for outbound calls enables agents to route calls through a specific queue directly from the Global Call window, improving routing accuracy and reporting.

Queue selection overview

A search interface enables agents to find and select a queue, and then choose to either:

- Set it as default for all outbound dialing methods
- Apply it to the current call only



Agents can modify queue settings during the idle state or during active calls. The default queue selection persists until changed or until the agent logs out, and applies across keypad, phone directory, and click-to-dial workflows. This feature is available for CCaaS partner integration.

Key benefits

Queue selection for outbound calls provides the following capabilities for contact center users:

- Queue selection directly from the Global Call window.
- Accurate reporting to track call outcomes by queue.
- Queue-specific requirements applied to each call.
- Consistent routing by applying business logic based on the selected queue.
- Reduced repetitive actions and errors.

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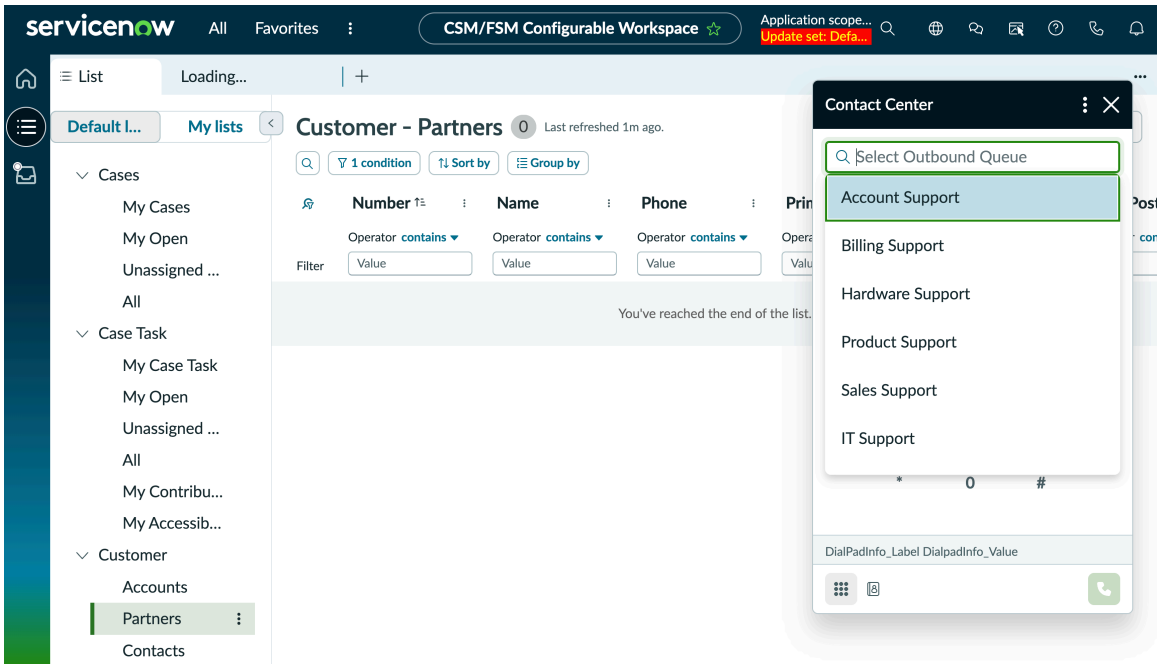
Queue selection features



Turn-on toggle for selecting queues for outbound calls

You can turn-on the toggle for **Select option to use queue for all outbound calls**, and set the queue as default, which applies to all outbound calls.

Find and select a queue in Global Call

Search for a queue by entering a name in the **Search** field and select the relevant queue.

Active context behavior

The selected queue applies to all subsequent outbound calls and remains active until the agent changes it or logs out. Only one queue is active at a time.

Adjust on-demand

Agents can change the active queue in the idle state or during an active call. Queue changes made during a call take effect on the next outgoing call, not the current one.

Consistency across dialing methods

The active queue persists across keypad, phone directory, and click-to-dial workflows to maintain consistent routing and reporting.

UI scope

Queue selection is embedded within the keypad and phone directory, as required by the CCaaS platform.

See: Using queues for outbound calls and Select queues from keypad, directory, and Interaction record.

Using queues for outbound calls

Use the toggle in the Global Call window to set a default queue for all your outbound calls during your current browser session, or select a queue for every call.

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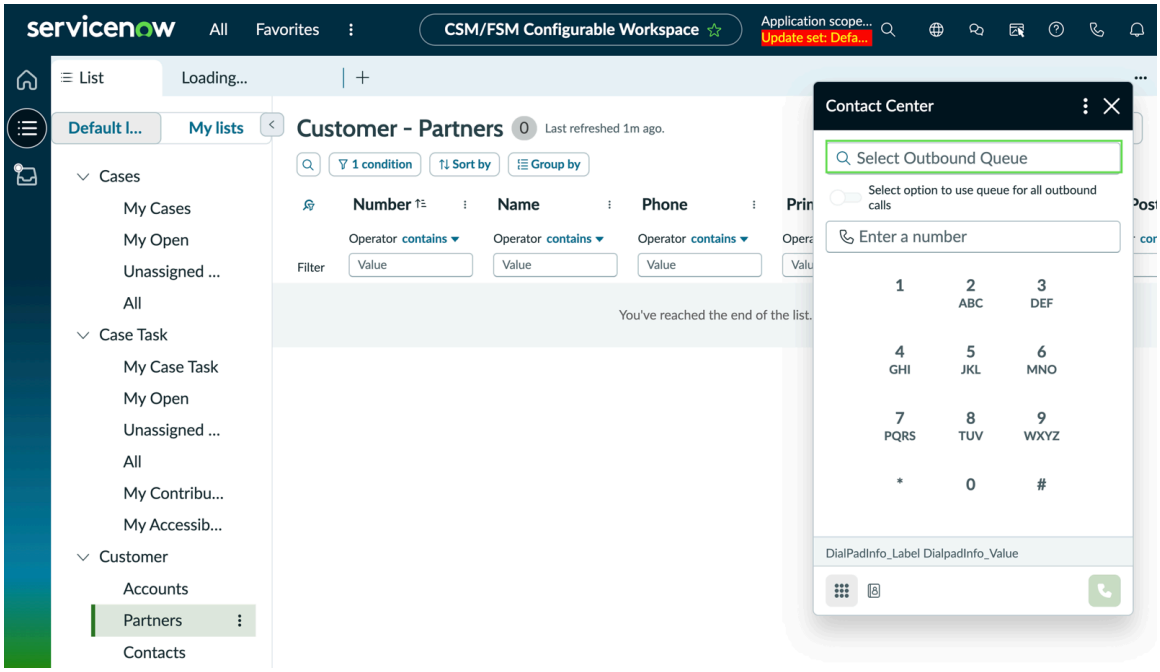
Turn on or Turn off toggle for selecting queues for outbound calls

The toggle enables you to set a default queue for all your outbound calls during your current browser session. This removes the need to select a queue for every outbound call. The the toggle is disabled when the selected outbound queue field is empty.



When you Turn on or Turn off the toggle, your selection is saved in your browser for the current session

- Your toggle setting persists across all browser tabs while you remain logged in.
- After you close and reopen a tab, your toggle setting remains unchanged.
- Your setting is cleared when you close the browser.

When you Turn on the toggle and select a default queue for all outbound calls

- The selected queue is applied to all outbound calls you make during the session.
- The call window or dialog does not reappear when you make subsequent outbound calls.
- After turning on the toggle and selecting a queue, you can close the queue selection window.
- Regardless of how you initiate an outbound call, the call uses the selected queue.

When you Turn off the toggle, and have not set a default queue for all outbound calls

- Every time you make an outbound call, the call window displays.
- For every outbound call, you can select a new outbound queue or modify the previously configured one.
- With the toggle is turned off, a selected outbound queue can be used for that call only.
- After closing the window, the selection window appears again on the next call attempt.

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See Select queues from keypad, directory, and Interaction record.

Select queues from keypad, directory, and Interaction record

This procedure describes how to select a queue and place outbound calls using the Global Call keypad and phone directory in the CCaaS platform. It covers both standard and mandatory queue selection scenarios.

Before you begin

Role required: Agent managing voice calls

- Log in to the CCaaS platform with the required permissions.
- Confirm access to the Global Call component in your workspace.
- Ensure the Interaction Controls Component (ICC) component is enabled.
- Verify assignment to at least one queue or skill group.

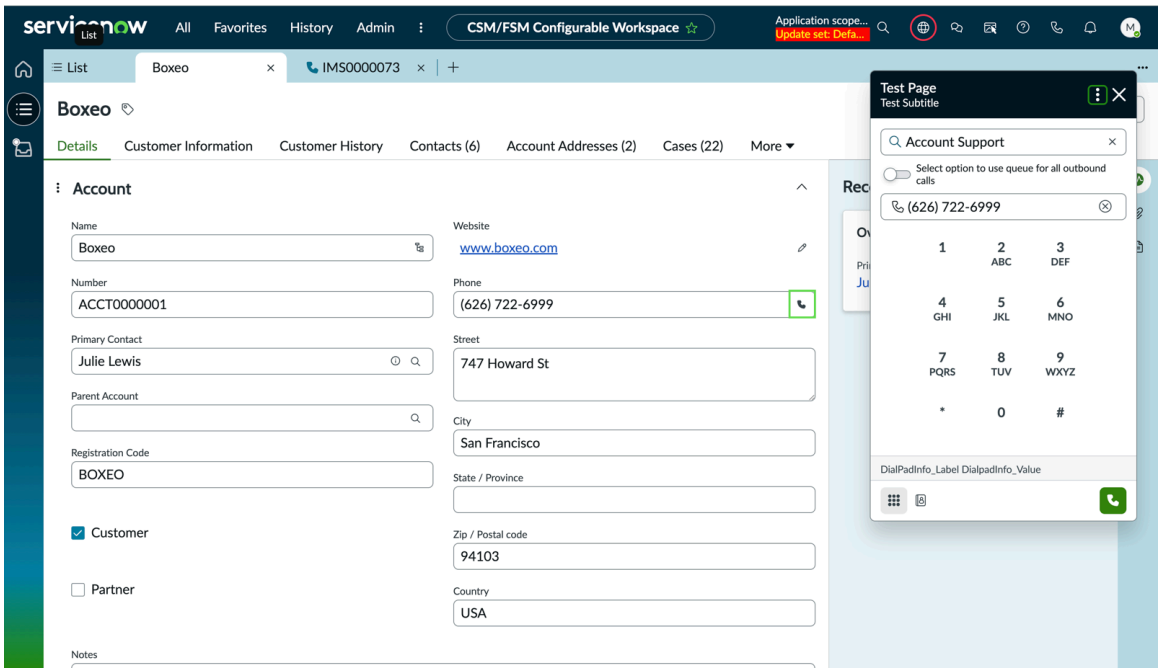
Follow these steps to select a queue and place an outbound call using the keypad, phone directory, or an Interaction record.

Procedure

1. Navigate to your configured CRM Workspace and select the phone icon to launch the call keypad.

   The **Select outbound queue** field displays giving you the option to either search for a queue by name or select one from the list of available queues.

   You can also click-to-dial from an Interaction record. In the keypad, select and set a queue as default for outbound calls. Once you set a queue for outbound calls and click-to-dial from a different Interaction record, the Active Call window displays. This window is integrated with the ICC, instead of the Global Call window.



2. In the **Search** field, begin entering the name of the queue to search for it or select the queue directly from the list displaying available queues.
3. The selected queue displays in the search field, confirming your choice.

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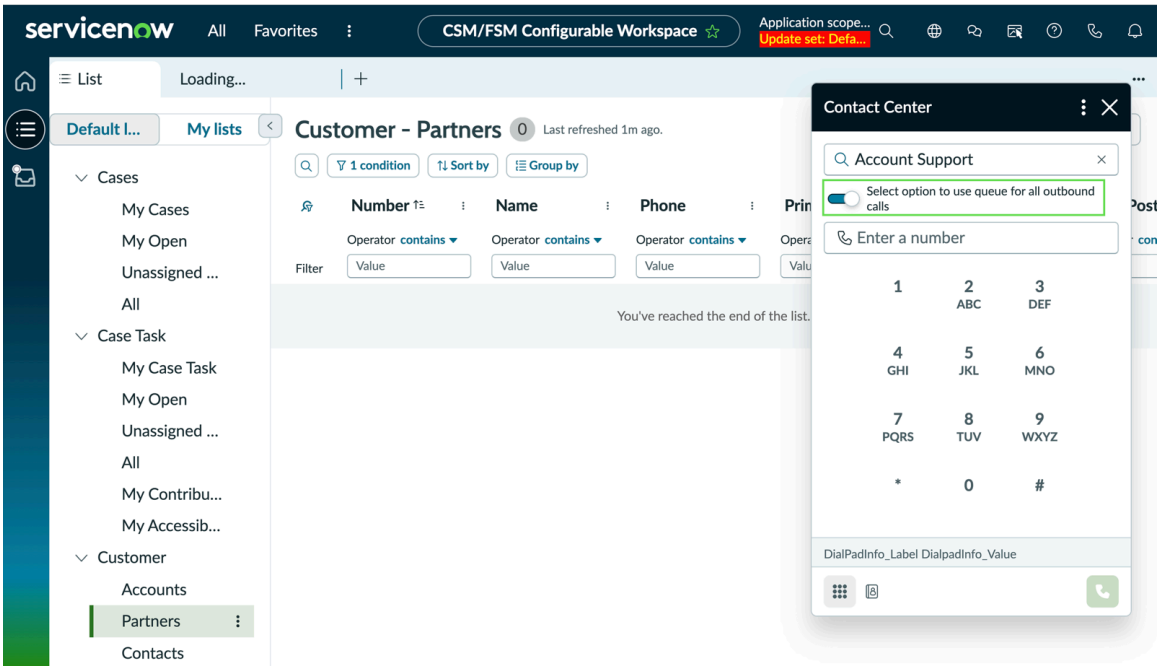
4. If you enable the toggle for **Select option to use queue for all outbound calls**, and set the queue as default, it applies to all your outbound calls.



5. Use the keypad or the phone directory to enter or select the phone number.
   The dial button becomes enabled when a valid number is entered in the keypad.
6. Select the dial button to initiate the outbound call with the selected queue and the interface transitions to an active call state displaying call details.
7. After the call ends, complete any required wrap up activities, such as selecting a wrap-up code and adding notes, and select **Submit & close**.

Result

The queue you selected remains active for your next outbound call. You can change the queue at any time by repeating steps 2 and 3, or you can continue using the same queue for subsequent calls.

Usage insights for call events enabled using Interaction Controls Component (ICC)

Usage Insights provides event tracking for voice call events in ICC enabled interactions. Admins and managers can review detailed call events to verify correct event actions and diagnose issues without accessing console logs.

Usage insights for call events overview

When an agent performs a call action from their Workspace, such as making an outbound call, receiving a call, muting a participant, starting a recording, or initiating a coaching session, the ICC component triggers a corresponding event. ServiceNow Platform Analytics captures each event with its payload and displays both in the **Usage Insights** dashboard.

Note: Usage Insights is accessible under Platform Analytics in any ServiceNow instance where the feature is enabled.

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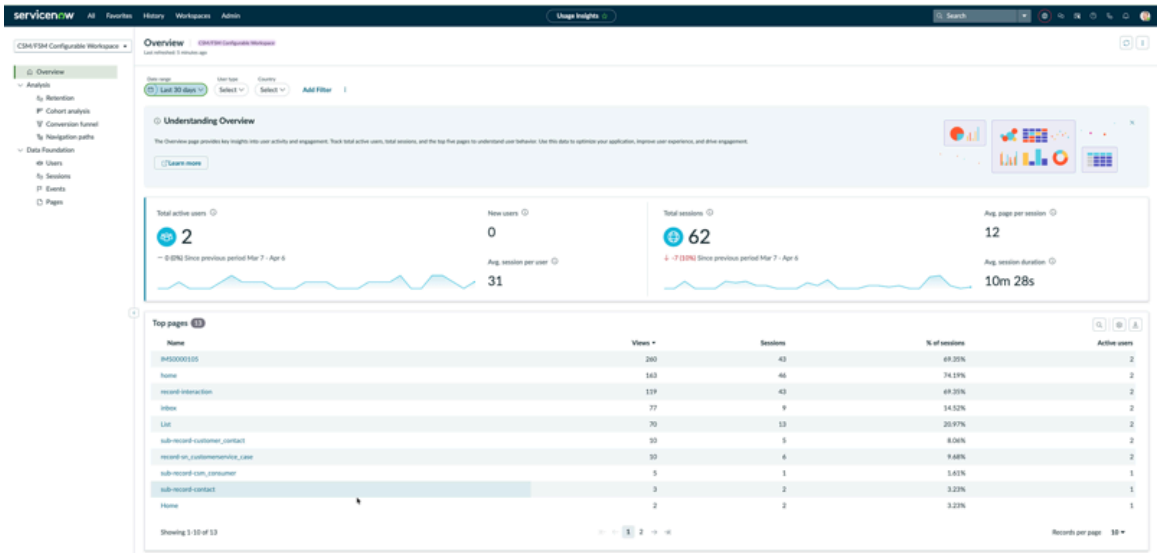

The **Usage Insights** dashboard displays all applications by default. To view the ICC events, filter by CSM/FSM Configurable Workspace. You can browse by the following views:

Users

Lists all agents who have triggered tracked events, displayed as hashed IDs. See Usage Insights dashboard.

Sessions

Shows individual agent sessions with a chronological list of events.

Events

Provides an aggregate view of all registered events with occurrence and active user counts.

Pages

Displays page level activity within the workspace.

All out-of-box call events are prefixed with 'NVC*'. This prefix makes it easy to search and filter a specific category of events from the **Events** tab, such as: NVC_HandleRecording, NVC_MuteParticipants, NVC_StartMonitoring etc.

Note: NVC or Native Voice Control are call capabilities made available for CCaaS users integrating with ServiceNow Voice via Interaction Controls Component (ICC).

Each event entry for usage insights includes a complete payload. The following table describes the common payload fields.

Call event payload fields

Field	Description
participant_id	Identifies the agent or customer associated with the event.
event_type	Type of action that occurred, such as mute, unmute, or record.
name	Name of the event, such as mute or handle_recording.
interaction sys_id	The sys_id of the corresponding interaction record in the ServiceNow instance.
external_id	An identifier from the external CCaaS provider associated with this interaction.

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Enable call events tracking by configuring the Usage Insights capability. See: Enable Usage insights for Interaction Controls Component (ICC) enabled call events.

Enable Usage insights for Interaction Controls Component (ICC) enabled call events

Configure **Usage Insights** to enable tracking of call events that are captured for agents. Admins and managers can view agent call events, inspect event payloads, and diagnose issues directly within the ServiceNow instance.

Before you begin

Role required: admin

To enable this capability complete the following independent configuration steps:

1. Enable analytics for agents.
2. Add agents to a system property that controls event logging.

Confirm the following prerequisites before you begin configuration:

Admins

You must have system administrator access to the ServiceNow instance to modify system properties.

Usage Insights access

Confirm that **Platform Analytics** > **Usage Insights** is available in your instance. The module is provided out-of-box.

ICC configuration

The agents you're enabling must be assigned to the instance enabled via ICC.

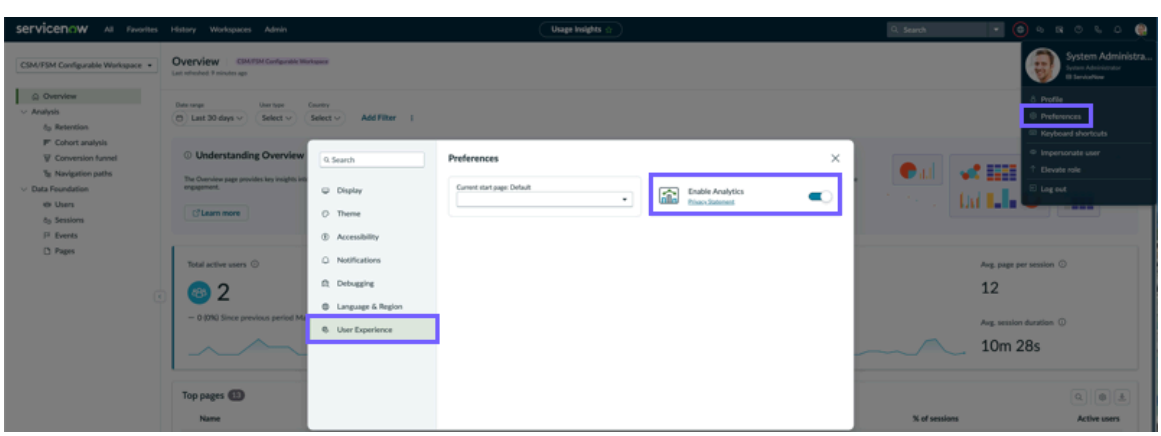
Agent availability

Agents must log in and update their own presence.

Procedure

1. Enable analytics in agent preferences.

   Each agent whose events you want to track must enable analytics in their own profile preferences. Repeat the following sub steps for each agent.



   a. Log in to the ServiceNow instance as the agent.

   b. Select the agent profile icon in the upper-right corner of the Workspace and select **Preferences**.

   c. Navigate to the **User Experience** section.

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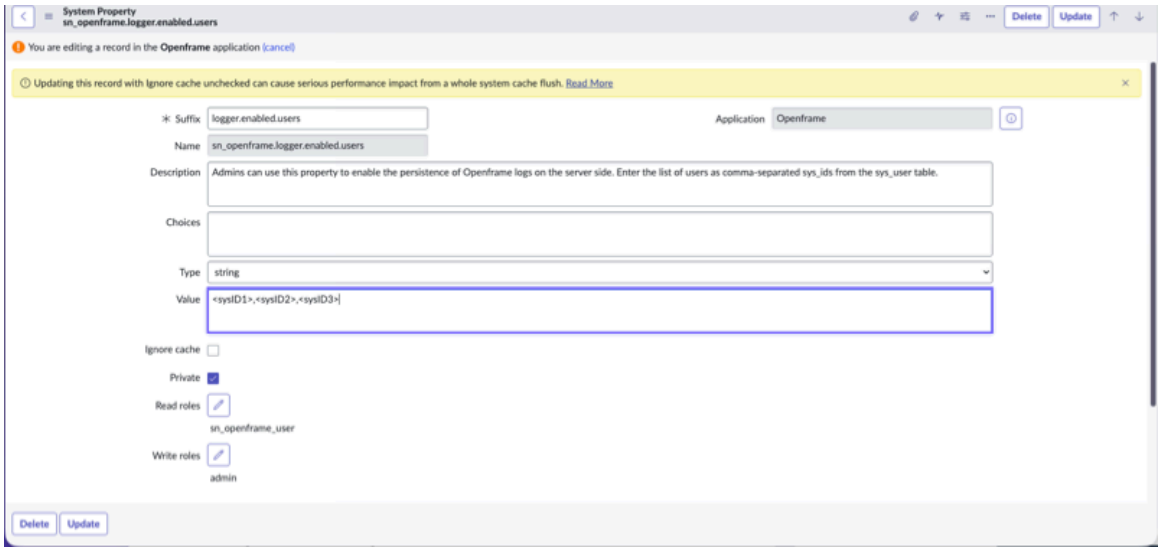
d. Locate the **Enable Analytics** toggle and set it to **ON**.

e. Save the preferences.
This setting must be configured individually for each agent as it is not applied globally.

2. Configure the *sn_openframe.logger.enabled.users* system property.

To log events for specific agents at the platform level, add their *sys_ids* to the *sn_openframe.logger.enabled.users* system property.



a. Log in to the ServiceNow instance as a system administrator.

b. Navigate to **System Properties** > **All Properties**, or search for *sn_openframe_logger_enabled_users* in the filter.

c. Open the *sn_openframe_logger_enabled_users* property record.

d. In the **Value** field, enter the *sys_ids* of the agents, separated by commas.
Use the following format:

```
<sysID1>,<sysID2>,<sysID3>
```

e. Select **Update** to save the property.
To find a *sys_id*, navigate to the *sys_user* list, locate the agent record, right-click the **sys_id** field, and select **Copy sys ID**.

3. Optional: Register custom events.
Perform this step only if agents use custom buttons added to the active call component. Out-of-box call events do not require additional registration.

a. Identify any custom call control buttons added to the active call component that are not part of the standard ICC event set.

b. Work with the development team to instrument each custom button using the **Usage Insights** event registration APIs.

c. Submit the new event registrations for approval and inclusion to the **Usage Intelligence Dashboard**.

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Result
After completing this configuration, **Usage Insights** begins capturing events for the agents you enabled. To confirm that events are captured, see Verify usage insights for Interaction Controls Component (ICC) enabled call events.

Verify usage insights for Interaction Controls Component (ICC) enabled call events

After you configure **Usage Insights**, confirm that call events are captured for the enabled agents and that event payloads appear as expected in the ServiceNow instance.

Before you begin
Role required: admin

Complete the configuration steps in Enable Usage insights for Interaction Controls Component (ICC) enabled call events before you verify the setup. The enabled agents must have logged in and performed call actions for events to appear.

About this task
After you complete the configuration, **Usage Insights** begins capturing events for the agents you enabled. Use the following steps to confirm that events are captured.

Procedure

1. Navigate to **Platform Analytics** > **Usage Insights** and filter by CSM/FSM Configurable Workspace.
2. Select the **Users** or **Sessions** view.
   The enabled agents' sessions appear after they log in and perform call actions.
3. Select a session and confirm that ICC triggered *`NVC events`* appear with complete payloads.

Result
The enabled agents' call events appear in **Usage Insights** with complete payloads.

Note: Users are displayed as #IDs in **Usage Insights**.

What to do next
If no events appear after an agent has completed a call action, verify that the **Enable Analytics** toggle is set to **ON** in the agent's preferences and that their *`sys_id`* is correctly entered in the *`sn_openframe_logger_enabled_users`* property.

Voice Controls Simulator tool

The Voice Controls Simulator tool enables CCaaS partners and customers to simulate and test voice control UI flows within the CRM Workspace.

CCaaS partners can test and validate call features within the UI to preview capabilities and verify readiness for Interaction Controls Component (ICC) voice integration. For example, CCaaS admins integrating with ICC voice capability can use this tool to view available voice features and their appearance in the UI.

Review the Voice Controls Simulator tool video to get an overview of how the tool works.

Voice Controls Simulator tool overview
https://player.vimeo.com/video/1228142215?h=34c735a211&badge=0&autopause=0&player_id=0&app_id=58479

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Key features

The Voice Controls Simulator tool enables admins to test various voice workflows and preview how voice features display in the CRM Workspace. This capability helps streamline the configuration and validation of CCaaS voice control capabilities.

The following are key features for the Voice Controls Simulator tool capability:

- Enables you to simulate and test voice control actions within the CRM Workspace.
- Provides an agent session as a simulation for idle state.
- Enables you to view simulated phone calls in the Global Call component, Active Call component, and Call transfer.
- Supports adding participants to replicate customer or agent interactions during simulated calls.
- Offers help tips and guidance to assist users in configuring the simulator.

Stages of the simulator

Simulator steps	Description
Launch simulator	After meeting all prerequisites, you're ready to launch the tool in the CRM Workspace.
Set Idle state	This state is the agent's initial state in the simulator. The agent can make an outbound call using the keypad or the phone directory. Additionally, if the agent doesn't want to take anymore calls they can log out of CCaaS.
Configure Transfer capabilities	If you select **Transfer** during the **Set Agent Capabilities** step, you can configure transfer options for agents, queues, external numbers, and direct dial.
Set Agent capabilities	Set up call controls for the simulated agent flow for an active call.

See Set up the Voice Controls Simulator tool.

Set up the Voice Controls Simulator tool

Integrate with Interaction Controls Component (ICC) to manage voice call features. Then, use the Voice Controls Simulator tool to set up your call experience.

1. Open the tool: Launch the Voice Controls Simulator tool from your workspace.
2. Explore call flows: Use the simulator to try out different voice call scenarios.
3. Customize your experience: Configure call scenarios in the CRM Workspace as required.

Voice Controls Simulator tool dependencies

Before you start, make sure you have the following:

1. Required plugins: Install ICC plugin.

   Note: After installation, the **Voice Test Tool Config** is available in the OpenFrame configurations.

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2. OpenFrame configuration:
   a. Navigate to **All** > **OpenFrame Configurations**.
   b. Search for **Voice Test Tool Config**, and set the active flag to 'true'.

      Note: You can access the test tool only if you have been added to the **Voice Test Tool User Group**.

   c. Verify user access:
      - Navigate to **Group** > **Voice Test Tool Users** and check user access or add new users here.
      - Check the roles assigned to each user in the group. The key role for this tool is: `sn_int_control_sim.voice_test_tool_user`.
3. User roles: Users added to the tool inherits these roles:
   - virtual_agent_admin
   - sn_int_control_sim.voice_test_tool_user
4. Supported workspaces: This tool works only in the CRM Workspace.

You are now ready to launch the Voice Controls Simulator tool. See Launching the simulator.

Launching the simulator

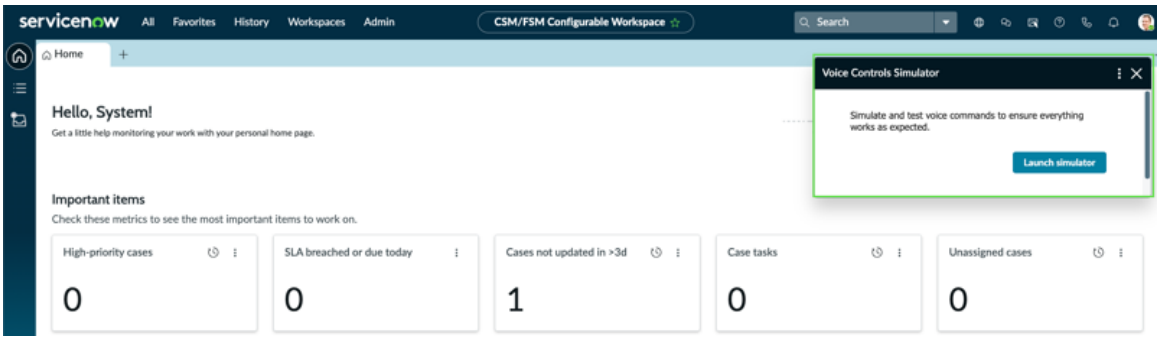
This feature lets agents set up and test their voice workflow in a simulated environment without the hassle of uploading payloads for testing call-flows. The Voice Controls Simulator is only available from the CRM Workspace.

Before you begin

Role required: CCaaS admin

Procedure

1. Select the phone icon in the header to open the Voice Controls Simulator tool.
2. Select **Launch test tool** to open the simulator in a new tab to begin configuration.



3. Begin the simulation by setting the idle state capabilities.
   For guidance, select the info icon to open the **Getting Started window**, which provides an overview of each phase in the simulator.

What to do next

Configure idle state capabilities, such as outbound call, logout, and phone directory. See Setting idle state.

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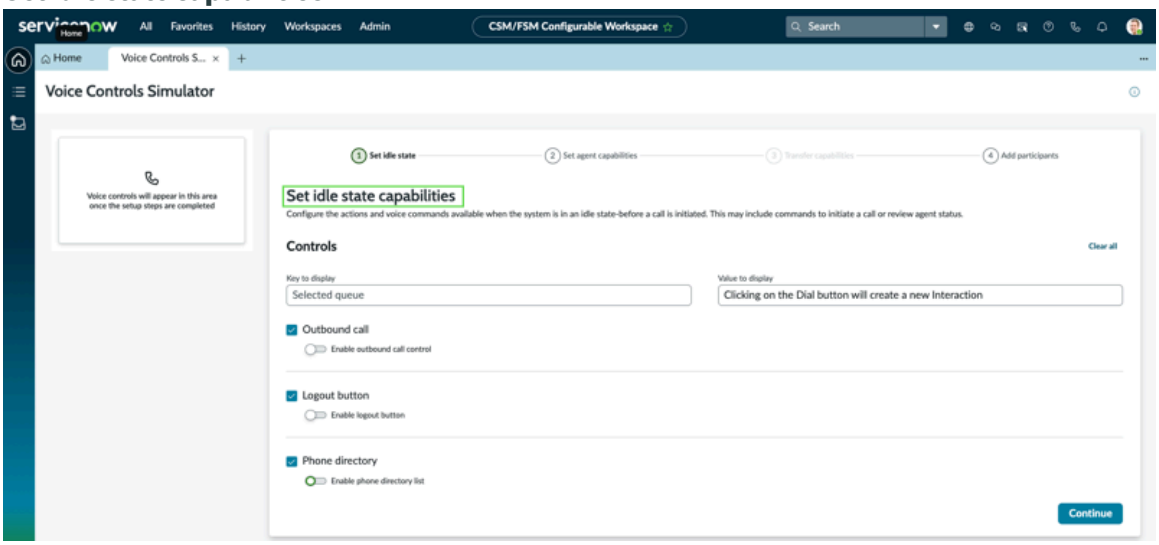
Setting idle state

An agent in the idle state is available to receive or initiate work. Customize this state by configuring call controls such as the phone keypad for outbound calls, directory access, and the logout feature to manage the CCaaS platform session.

Before you begin

Role required: admin

Set idle state capabilities



Procedure

1. Configure display fields by entering a key and value in the **Key to display** and **Value to display** fields.
   This value is set by the contact center admin. For example, Key = `Selected Queue`, and Value = `Customer Inquiries`.
2. Select the **Controls** Options.
3. Select to enable the **Phone directory** option to display the **Queues**, **Agents**, **External numbers**, and **Direct dial** tabs.
4. Use the **Edit** icon to update entries.

   By default, the **Outbound call**, **Logout**, and **Phone directory** options are enabled. You can clear any options as needed. See Configuring Transfer capabilities.

   When you have the **Outbound call** feature enabled in the simulator, a system notification displays stating that outbound calls create new Interactions.
5. Select **Save and continue** to set the chosen options that opens the Global call window with the updated values.
   The window displays icons for the enabled features. The **Phone directory** feature, if not selected, appears inactive.
6. Configure call controls by selecting options such as **Mute**, **Hold**, **Transfer**, **Flag**, **DTMF**, and **End call**.
7. Configure **Recording** controls by selecting options such as **Start**, **Stop**, **Pause**, or **Resume recording**.
8. Select **Save and continue** and move on to the next step for adding participants.

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- Select **Clear all** to remove all input data for the section you're updating.
- Select the **Logout** and **Reset** options to return to the idle state setup.

What to do next

If you enable **Transfer**, the simulator guides you through the transfer capabilities setup. If you choose not to select the **Transfer** capability, select **Continue** to proceed to adding participants. See Configuring Transfer capabilities.

Configuring Transfer capabilities

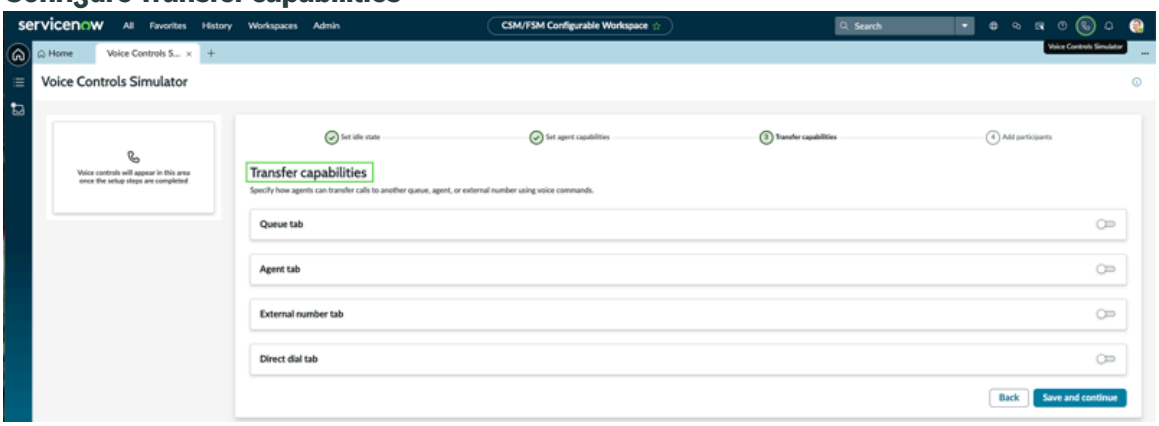
This step in the simulator doesn't display if you didn't select **Transfer capability**. Any value configured in the **Phone directory**, in the **Set Idle State capabilities** step, reflects in the **Transfer list**.

Before you begin

Role required: admin

This step lets you set up transfer options for agents, queues, external numbers, and direct dial during a simulated call.

Configure Transfer capabilities



Procedure

1. Select the transfer option in the **Set agent capabilities** step to activate the **Transfer capabilities** tab.
2. Enable the **Agent**, **Queue**, **External number**, and **Direct dial** tabs.
   Each tab is pre-populated with five entries, which is also the maximum number of participants you can add.
3. Use the **Edit** icon to update or remove entries as needed.
4. Select **Save and continue** to proceed to the **Add participants** step.
5. Select **Submit** to save your selections.

What to do next

Select the phone icon in the header to view your configured voice control features in the Global call and Active call windows. See Interaction Controls Component (ICC) call features for call control feature definitions.

Continue to the final step in the simulation to Adding participants.

Adding participants

This step is the final phase in your simulation where you add agent details and assign call capabilities for each participant.

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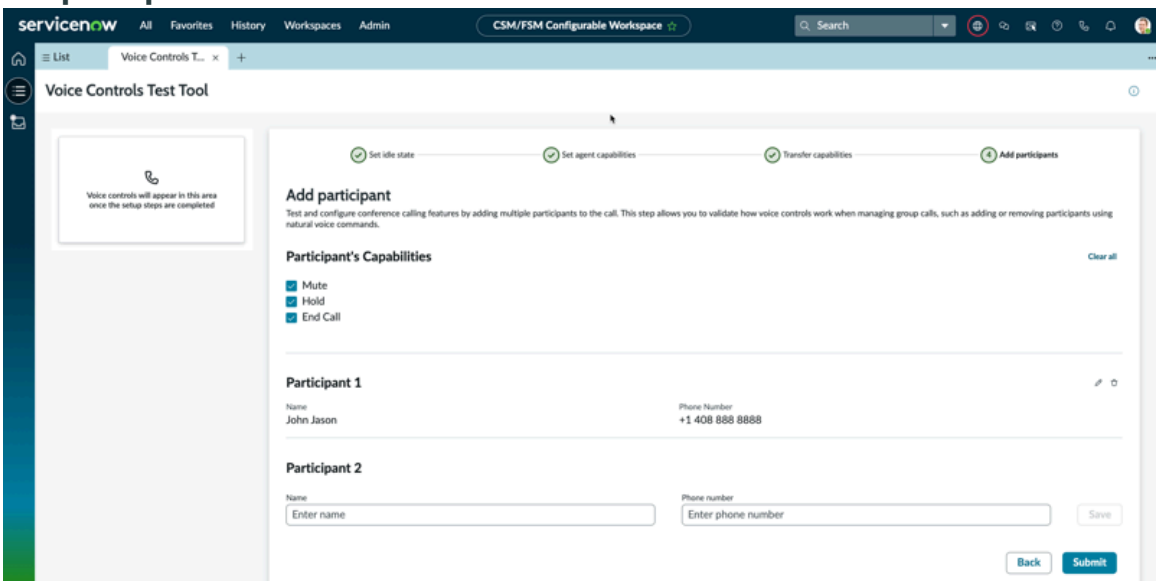
Before you begin

Role required: admin

The first participant represents the user initiating the call. Adding subsequent participants simulates a multiparty call. For example, when a second agent or supervisor joins the call, or when one agent consults with another in the same call.

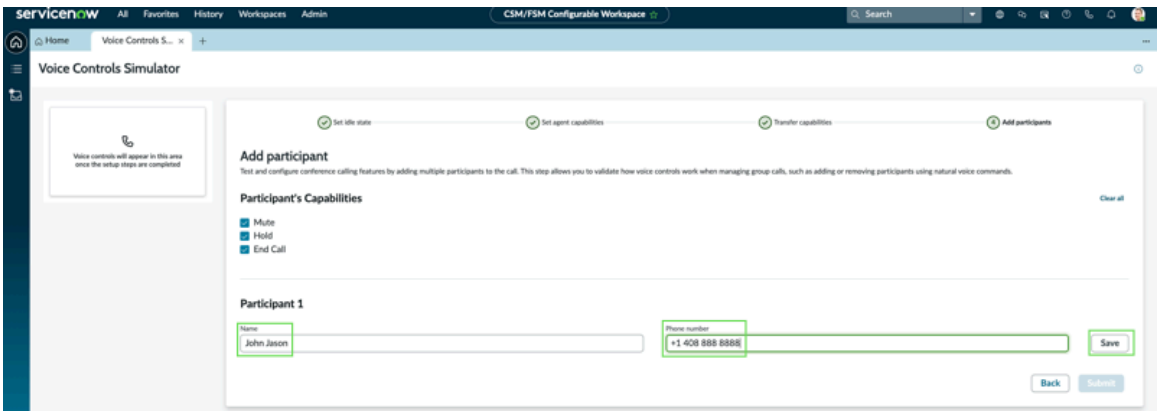
Add participants



Procedure

1. Fill in at least one field such as the Name or Phone Number for each participant.

   You can add up to five participants. Save each participant details before submitting your configuration.



2. Select **Submit** to display the Global call window with your updated selections.

   The Voice Controls Simulator tool provides a synchronized view across both Global Call and Active Call windows. Selecting any call button, such as hold or mute, instantly updates both call windows.

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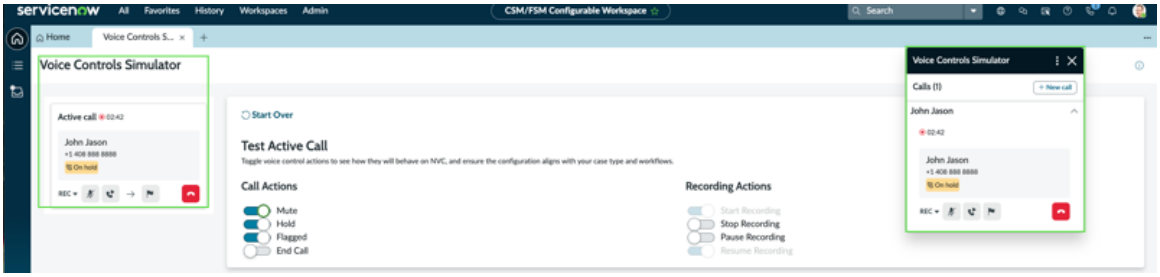

3. Select **Start Over** to reset your simulation and return to the set idle state capabilities step.

Result

The **Add participants** is the final step in the Voice Controls Simulator. After submitting your configuration, you're ready to begin using the configured call workflow in your workspace.

Integrating with Microsoft Outlook

Integrate Customer Service Management with Microsoft Outlook to perform tasks such as managing contacts and cases from within Microsoft Outlook.

The following plugins are required to enable you to interact with the ServiceNow platform and customers from within Microsoft Outlook:

- ServiceNow Add-In for Microsoft Outlook (com.sn_outlook_addin)
- Customer Proxy Contacts (com.snc.csm_proxy_contacts)

Integrate Customer Service Management with Microsoft Outlook

Customer Service Management provides an integration with Microsoft Outlook. This integration enables you to manage workflows such as creating and updating contacts and cases from within Microsoft Outlook.

Before you begin

Role required: admin

About this task

Note: You must be an Office 365 administrator to deploy the ServiceNow Add-in for Microsoft Outlook. This add-in is supported only for use with Microsoft Outlook 2016+ for MacOS and for Windows.

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the ServiceNow Add-In for Microsoft Outlook plugin (com.sn_outlook_addin).
3. Click **Activate**.
4. Search for the Customer Proxy Contacts plugin (com.snc.csm_proxy_contacts).
5. Click **Activate**.

Related topics

Using Microsoft Outlook with CSM

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Configure the ServiceNow Add-in for Microsoft Outlook

Configure user roles and download the office add-in manifest file in order to use the ServiceNow Add-in for Microsoft Outlook.

Before you begin

Role required: admin or both sn_csm_proxy_cont and sn_customerservice.contact_manager roles.

Procedure

1. Go to your ServiceNow instance.
2. Navigate to **ServiceNow Add-Ins for Office** > **Office Add-In-Manifests**.
3. Click **ServiceNow for CSM**.
4. Click **Download Manifest** to download the Microsoft Office add-in manifest file.
5. Provide the downloaded `manifest.xml` file to the account manager to enable the installation of the add-in.

Related topics

Install the ServiceNow Add-in for Microsoft Outlook

Include a combined CSM and ITSM add-in icon in Microsoft Outlook

Enable users to access both CSM and ITSM through one combined add-in icon.

Before you begin

Role required: sn_customerservice.contact_manager and sn_csm_proxy_cont

Procedure

1. Go to your ServiceNow instance.
2. Navigate to **ServiceNow Add-Ins for Office** > **Office Add-in Manifests**.
3. Download the manifest files for CSM and ITSM.

Option	Description
ServiceNow for CSM	Manifest file for CSM.
ServiceNow for ITSM	Manifest file for ITSM.

4. Click **Download Manifest**.
5. Install the ServiceNow Add-in for Microsoft Outlook add-in.
   Follow the procedure in Install the ServiceNow Add-in for Microsoft Outlook.
   The ServiceNow for CSM/ITSM icon appears in the header and users can view both the CSM and ITSM tasks through it.

Install the ServiceNow Add-in for Microsoft Outlook

Installing the ServiceNow Add-in for Microsoft Outlook enables you to interact with the ServiceNow platform from within Microsoft Outlook.

Before you begin

Role required: sn_customerservice.contact_manager

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Your admin must provide you with the `manifest.xml` file by logging into the ServiceNow instance and enabling the ServiceNow Add-Ins for Office

Procedure

1. Navigate to Microsoft Outlook in your ServiceNow instance.
2. In Microsoft Outlook, click the ellipsis (...) in the menu bar.
3. Select **Get Add-ins**.
4. In the **Office Add-ins** window, navigate to **All add-ins** > **My add-ins**.
5. From the **Custom add-ins** tile and select **Add from file** from the **Add a custom add-in** drop-down list.
6. Select the `manifest.xml` file that your admin provided.
7. Click **Install**.
8. Click **ServiceNow add-in** in Microsoft Outlook to open the login page.
9. Log in with your ServiceNow instance credentials (the same credentials you use to log into the ServiceNow platform).
10. Select **Allow** to authorize the connection.

Result

You can now connect to your account on your ServiceNow instance and interact with its records from within Microsoft Outlook.

Integrating with Safe Workplace applications

Integrate Customer Service Management with ServiceNow® Safe Workplace applications. This integration helps you safely reopen locations and support the health and safety of contacts and consumers after emergencies and pandemics.

Overview

Integrate with Safe Workplace applications, specifically with the Employee Health Screening application, to enable contacts or consumers to safely enter locations and comply with health and safety policies.

As a consumer or contact, verify that you understand and comply with requirements and policies by filling out the Health Verification form on the Consumer or Customer Service Portal.

As a customer or consumer service agent, screen contacts or consumers entering a location to ensure compliance with entry requirements such as a temperature check and Personal Protection Equipment (PPE).

For more information on the Employee Health Screening application, see Employee Health Screening.

Key features

- Access for consumers and contacts to the Health Verification form on the Consumer or Customer Service Portals.
- Ability for customer or consumer service agents to screen consumers and contacts on visiting a location.

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Set up Customer Service Management integration with Safe Workplace applications

Enable the integration with Safe Workplace applications to help contacts or consumers safely enter locations and comply with health and safety policies.

Before you begin

Ensure that the Case Management Core plugin (com.sn_customerservice) is installed.

If you are supporting business-to-consumer (B2C) customers, ensure that the Consumer Service Portal plugin (com.glide.service-portal.consumer-portal) is installed.

Role required: admin

Procedure

1. Install Employee Health Screening.
2. Give external users access to the Health Verification form.
   For more information, see the Allow external users access to "Health Verification" catalog item [KB0856301] article in the HI Knowledge Base.
3. Assign the sn_imt_monitoring.monitoring_user role to a customer or consumer service agent.
4. **Optional:** Configure the health screening form.
5. **Optional:** Create relationships to show health screening information on Agent Workspace.
6. **Optional:** Customize the Consumer or Customer Service Portal to display a link to the Health Verification form in the portal header menu.

Configure the health screening form

Provide additional information on contacts or consumers to health screeners by adding fields to the health screening form.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definition** > **Record Producers**.
   a. In the Record Producers list, search for `Screen a person` in the **Name** column.
   b. In the Variables related list, click **New**.
   c. Create a variable.
      For more information about the different types of variables and how to configure them, see Creating variables.
   d. Click **Submit**.
   e. In the Catalog Client Scripts related list, open **Show additional CSM fields**.
   f. Add the variable to the client script as a consumer or contact field.
      For more information on client scripts, see Client scripts.
2. Navigate to **Activity Subscriptions** > **Script Includes**.

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a. Add the variables to the **HealthScreeningUtil** script include.
For more information on script includes, see Script includes.

Using Customer Service Management with Safe Workplace applications

Screen consumers and contacts for compliance with health and safety policies to determine whether they are permitted to enter a location.

To ensure that consumers and contacts can enter a location safely after emergencies and pandemics, consumers or contacts fill out a Health Verification form and health screeners or customer or consumer service agents perform a health screening.

Note: Typically, you receive an email or a mobile notification with a link to the health verification form. Alternatively, you can search for the health verification form on the Consumer or Customer Service Portal.

Roles required

Users with the roles listed in the following table can use Customer Service Management with Safe Workplace applications.

Roles Required for Safe Workplace applications

Role	Task
sn_customerservice.consumer or sn_customerservice_customer	Access and complete the Health Verification form on the Consumer or Customer Service Portals. **Note:** For more information on filling out the form, see Verify your health status and compliance.
sn_imt_monitoring.monitoring _user	Screen external users entering a location to ensure compliance with entry requirements. **Note:** Health screeners cannot view additional Customer Service Management information on the screening form. For more information on screening, see Conduct a health screen for entry.
sn_customerserviceagent with the sn_imt_monitoring.monitoring_user role	Screen contacts entering a location to ensure compliance with entry requirements. The **Accounts** field for contacts is displayed by default on the screening form. Other fields that have been configured for contacts are also visible.
sn_customerservice.consumer_agent with the sn_imt_monitoring.monitoring_user role	Screen consumers entering a location to ensure compliance with entry requirements.

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Roles Required for Safe Workplace applications (continued)

Role	Task
	The **Suffix** field for consumers is displayed by default on the screening form. Other fields that have been configured for consumers are also visible.

Integrating with consumer messaging apps

Integrate Customer Service Management with each consumer messaging app to deliver a conversational mobile messaging experience for consumers and customer contacts.

Engage customers wherever they are with useful conversations by enabling them to message anytime to your company's account using their choice of messaging apps. Consumers and customer contacts can start conversations with a virtual agent by sending messages to your company's designated mobile number. They can also select to chat with a live agent from the same messaging app.

The following consumer messaging apps can be integrated with Customer Service Management:

- WhatsApp: Integrating WhatsApp with Customer Service Management through Twilio and Integrating WhatsApp with Customer Service Management using the WhatsApp Cloud API.
- LINE: Integrating LINE with Customer Service Management.
- Facebook Messenger: Integrating Facebook Messenger with Customer Service Management.
- Apple Messages for Business: Integrating Apple Messages for Business with Customer Service Management.

Integrating WhatsApp with Customer Service Management through Twilio

Deliver a pre-integrated chat conversation experience with the WhatsApp messaging app for consumers and customer contacts. Integrate WhatsApp by using the ServiceNow® Conversational Integration with WhatsApp (powered by Twilio) application.

As an administrator, if you have configured the Conversational Integration with WhatsApp (powered by Twilio) application, then your customer contacts and consumers can initiate a WhatsApp chat conversation with a virtual agent or live agent. An agent can initiate a conversation or accept a conversation initiated from a WhatsApp chat conversation. For more information, see Configure Conversational Integration with WhatsApp (powered by Twilio).

Note: As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features of the integration include the following:

- Initiate WhatsApp chat conversations with a virtual agent, live agent, or customer.
- Use the chat to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.
- View the WhatsApp chat conversation details from which a work item was initiated in Agent Workspace.

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- Indicate your presence in the Agent Workspace Inbox with the WhatsApp service channel.
- Make outbound chat conversations to connect with a customer's WhatsApp chat conversation, and automatically capture interaction details to simplify data entry.

Example workflows

The following example workflow shows the use of the Conversational Integration with WhatsApp (powered by Twilio) application in resolving a consumer issue:

1. A customer has an issue with a product and initiates a WhatsApp chat conversation using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer selects the product and views the knowledge articles associated with the product.
4. The customer then selects to chat with a live agent.
5. A live agent accepts the customer request. The Customer Service Management application starts another interaction of type **Messaging**.
6. The live agent creates a case on the product, and then closes the conversation.

The following example workflow shows the use of the Conversational Integration with WhatsApp (powered by Twilio) application in addressing customer feedback:

1. A customer purchases a new product and opts in to receive notifications from your business on the WhatsApp app.
2. The customer receives a welcome message from customer support.
3. After two months, the customer receives another message asking for feedback on the product.
4. The customer shares negative feedback.
5. An agent reviews the feedback and starts a conversation with the customer to offer help and find out more about the customer’s experience with the product.

End users and roles

The users with the roles listed in the following table can use the Conversational Integration with WhatsApp (powered by Twilio) application.

Roles required for Conversational Integration with WhatsApp (powered by Twilio)

Roles	Tasks
agent_workspace_user	Accept an ongoing WhatsApp chat conversation with a customer through the WhatsApp service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a WhatsApp chat conversation by using interaction records of type **Messaging** and subtype **WhatsApp**.
sn_customerservice.consumer, sn_customerservice.customer	Initiate WhatsApp chat conversations with a virtual agent or live agent so that you can search for articles in Communities

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Roles required for Conversational Integration with WhatsApp (powered by Twilio) (continued)

Roles	Tasks
	and Knowledge Management, access service catalogs, and create a customer service case.

Integrating WhatsApp with Customer Service Management using the WhatsApp Cloud API

Use WhatsApp messaging with Customer Service Management to enable direct communication with customers through WhatsApp using the WhatsApp Cloud API.

This WhatsApp direct integration connects to Meta's WhatsApp business platform and enables agents to provide real-time customer support with rich media, interactive controls, and full CSM workflow integration.

The WhatsApp channel supports both automated conversations through Virtual Agent and live agent interactions through Agent Workspace, providing a complete customer service experience.

WhatsApp messaging capabilities

WhatsApp messaging capabilities in Customer Service Management enable rich, interactive customer conversations beyond basic text messaging. Agents can exchange media files, send structured interactive controls, request customer inputs, and deliver formatted messages that improve clarity and reduce friction.

Rich and interactive messaging features

WhatsApp supports the following messaging features and rich interactive controls:

- Text messaging
- Rich media (images, videos, audio files, documents)
- Typing indicators
- Location sharing
- List pickers
- Opt-in and consent

WhatsApp rich controls

Rich controls	Description
Typing indicators	Real-time visual feedback shows when agents or customers are composing messages, keeping both parties informed about conversation activity. Agent-side capabilities:

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WhatsApp rich controls (continued)

Rich controls	Description
	• Automatically displayed to customer when agent types in Agent Workspace • Appears as "typing..." status in customer's WhatsApp • Provides immediate feedback that agent is responding
Message status indicators	WhatsApp automatically handles message delivery and read status indicators according to WhatsApp's standard behavior. The application displays these statuses in the interaction timeline. Status indicators (for users): • Sent: Single gray checkmark (message sent to WhatsApp server) • Delivered: Double gray checkmarks (message delivered to agent's device) • Read: Double blue checkmarks (agent viewed message) Status indicator (for agent): Sent: Single gray checkmark (message sent to user's device)
Link previews	URLs in messages automatically generate rich previews with images, titles, and descriptions.
Customer-initiated conversations	These conversations begin when the customer sends the first message to your business. WhatsApp applies specific rules for messages sent within this interaction window. Messaging window: • Opens when customer sends first message • Remains open for 24 hours from last customer message • Resets to 24 hours with each new customer message • Agent can send any messages within this window Characteristics:

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WhatsApp rich controls (continued)

Rich controls	Description
	• No restrictions on message content • Supports all message types and interactive features • Most common conversation type for customer serviceOpens when customer sends first message
Agent-initiated conversations	These conversations begin when agent proactively messages the customer. WhatsApp enables outbound initiation only under certain conditions. Requirements: • Customer must have active channel user profile in the application • Customer must have opted in to receive messages • Customer's phone number must be valid and registered on WhatsApp • Must be within 24 hours of customer's last message
System-initiated conversations	These conversations begin when an automated workflow sends a WhatsApp message to the customer. Requirements: • Customer must have opted in • Must be within 24 hours of customer's last message
Opt-in and consent	The integration captures and records customer opt-in and opt-out messages to track communication consent.

End users and roles

The users with the roles listed in the following table can use the Conversational Integration with WhatsApp (WhatsApp Cloud API) application.

Roles required for Conversational Integration with WhatsApp (WhatsApp Cloud API)

Role	Tasks
admin	Configure and manage the WhatsApp Cloud API integration, including connection settings, routing rules, system properties, and security configurations.

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Roles required for Conversational Integration with WhatsApp (WhatsApp Cloud API) (continued)

Role	Tasks
agent_workspace_user	Accept an ongoing WhatsApp chat conversation with a customer through the WhatsApp service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a WhatsApp chat conversation by using interaction records of type Messaging and subtype WhatsApp.
sn_customerservice.consumer, sn_customerservice.customer	Initiate WhatsApp chat conversations with a Virtual Agent or live agent so that you can search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Related topics

System properties for configuring WhatsApp (WhatsApp Cloud API)

Configure Conversational Integration with WhatsApp (WhatsApp Cloud API)

Using Conversational Integration with WhatsApp (WhatsApp Cloud API)

System properties for configuring WhatsApp (WhatsApp Cloud API)

You can configure the system properties for your Conversational Integration with WhatsApp (WhatsApp Cloud API) application so that you can enable secure and authenticated communication.

Navigate to#**All> System Properties> All Properties**.

Alternatively, in your instance, enter `sys_properties.list` in the filter navigator and customize the WhatsApp (WhatsApp Cloud API) system properties.

System properties for WhatsApp (WhatsApp Cloud API)

Property	Description
sn_va_whatsapp.webhook_verify_token	Stores the verification token used to authenticate the incoming messages from WhatsApp. • Type: password2 • Default value: None (must be configured during the initial setup) • Location: **All> System Properties> All Properties**.

WhatsApp Direct Integration on NextWave

WhatsApp Direct Integration is available on the NextWave off-Glide architecture, providing the same messaging capabilities as the Glide-based implementation with improved performance and scalability.

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WhatsApp Direct Integration on the NextWave off-Glide architecture enables agents to provide real-time customer support through WhatsApp with rich media, interactive controls, and full Customer Service Management workflow integration. This implementation builds WhatsApp channel support natively on NextWave, achieving functional parity with the existing Glide-based behavior.

Existing customer configurations and interaction history are preserved. The NextWave architecture provides improved performance, scalability, and access to NextWave-specific features while maintaining backward compatibility.

Supported capabilities

The WhatsApp channel on NextWave supports the following capabilities:

- Text message exchange: Send and receive text messages between ServiceNow and WhatsApp, with conversation threading and interaction history. See Exchange text messages through WhatsApp on NextWave.
- Media attachments: Exchange images, documents, and video links between agents and customers. See Handle media attachments in WhatsApp on NextWave.
- Rich messaging controls: Request Location (capture customer location as a map pin), List Picker (present selectable options), and Typing Indicator (display agent typing status). See Use rich messaging controls in WhatsApp on NextWave.
- Audio features: Customers send voice messages that agents play back in the workspace, and agents record and send voice messages where supported. See Use audio features in WhatsApp on NextWave.
- Bot response controls: Text, LLM-generated text, card, HTML, image, link, multi-response, script, table, and video responses from Virtual Agent conversations. See Supported bot response controls for WhatsApp on NextWave.
- User input controls: Text input, boolean, static choice, dynamic choice, carousel, input collector, file picker, grouped choice, and secure text controls with LLM-assisted input matching. See Supported user input controls for WhatsApp on NextWave.
- Account linking: Automatic and manual linking of WhatsApp customers to contact or consumer records. See Set up account linking for WhatsApp on NextWave.

Personas

The following personas interact with WhatsApp Direct Integration on NextWave:

Personas for WhatsApp on NextWave

Persona	Role	Primary need
Customer	Sends and receives WhatsApp messages, including rich media and audio notes	Conversations feel native to WhatsApp with no missing features or broken media
Agent	Views and responds to WhatsApp conversations in the CRM Workspace	Full context (attachments, location) visible in the interaction record without switching tools
Administrator	Configures the WhatsApp Direct Integration channel	Existing configurations continue to work without manual re-setup after the off-Glide build goes live

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Related topics

Integrating WhatsApp with Customer Service Management using the WhatsApp Cloud API

Exchange text messages through WhatsApp on NextWave

Send and receive text messages between ServiceNow and WhatsApp using the NextWave off-Glide architecture, with conversation threading and full interaction history.

Before you begin

Role required: *sn_customerservice_agent*

The WhatsApp Direct Integration channel must be configured and active in your Customer Service Management instance. See Configure WhatsApp channel.

About this task

When a customer sends a text message through WhatsApp, the NextWave off-Glide pipeline receives the message and creates an interaction record in Customer Service Management. The message appears in the agent's CRM Workspace with the full conversation thread.

Agents respond directly from the workspace. Outbound messages are delivered to the customer's WhatsApp app through the NextWave pipeline, maintaining the same conversation thread.

Procedure

1. Open the CRM Workspace and locate the WhatsApp interaction in your queue.

   Inbound WhatsApp messages arrive as interactions with type **Messaging** and subtype **WhatsApp**.

2. Accept the interaction to open the conversation thread.

   The conversation pane displays the customer's message along with any previous interaction history.

3. Type your response in the message input field and send.

   The message is delivered to the customer's WhatsApp app through the NextWave off-Glide pipeline. Conversation threading and interaction history are maintained automatically.

Result

Text messages flow between ServiceNow and WhatsApp through the NextWave off-Glide pipeline. Interaction history, including threading, is preserved and accessible in the interaction record.

Handle media attachments in WhatsApp on NextWave

Send and receive images, documents, and video links between agents and customers through the WhatsApp channel on the NextWave off-Glide architecture.

Before you begin

Role required: *sn_customerservice_agent*

The WhatsApp Direct Integration channel must be configured and active.

About this task

The WhatsApp channel on NextWave supports the following attachment types between agents and customers:

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- Images
- Documents
- Video links

Attachment upload, transmission, and rendering operate through the NextWave off-Glide pipeline with functional parity to the Glide-based implementation. Attachment metadata and interaction history are preserved.

Procedure

1. Open the WhatsApp interaction in the CRM Workspace.
2. To send an attachment, select the attachment control in the message input area and choose a file.

   Supported file types and size limits are governed by WhatsApp Cloud API constraints. Files that exceed these constraints are rejected with a message to the sender.

3. To view an inbound attachment, select the media item in the conversation thread.

   Inbound attachments from customers are attached to the interaction record and are retrievable by the agent. Attachment metadata (file name, type, size) is captured automatically.

Result

Media attachments are exchanged between ServiceNow and WhatsApp through the NextWave off-Glide pipeline. Attachment metadata and interaction history remain intact.

Use rich messaging controls in WhatsApp on NextWave

Use Request Location, List Picker, and Typing Indicator controls in WhatsApp conversations on the NextWave off-Glide architecture.

Before you begin

Role required: *sn_customerservice_agent*

The WhatsApp Direct Integration channel must be configured and active on your instance.

About this task

The WhatsApp Cloud API supports rich messaging controls that go beyond basic text. These controls are available on NextWave off-Glide with functional parity to the Glide-based implementation.

Procedure

Request Location

1. During a conversation, use the Request Location control to prompt the customer to share their location.

   The customer receives a location-sharing prompt in WhatsApp. When the customer shares their location, the data appears as a location pin in the agent interface within the interaction record.

List Picker

2. Configure a List Picker control to present a set of selectable options to the customer during a conversation.

   The List Picker renders in the customer's WhatsApp app as a native selection interface. Customer selections are captured and stored in the interaction record.

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Typing Indicator

3. The Typing Indicator displays automatically in the customer's WhatsApp app when an agent is typing a response.

   No manual configuration is required for the Typing Indicator. When an agent types in the CRM Workspace, the indicator appears on the customer side through the NextWave off-Glide pipeline.

Result

Rich messaging controls operate through the NextWave off-Glide pipeline with functional parity to the Glide-based implementation. Location data, selection data, and interaction history are preserved in the interaction record.

Use audio features in WhatsApp on NextWave

Play back customer voice messages and record agent voice messages in WhatsApp conversations on the NextWave off-Glide architecture.

Before you begin

Role required: *sn_customerservice_agent*

About this task

Customers can record and send audio messages through WhatsApp, and agents can play them back in the CRM Workspace on NextWave. Agents can also record and send voice messages to customers where the channel supports it.

Audio file format, size, and duration constraints are governed by the WhatsApp Cloud API specifications.

Procedure

Play back a customer voice message

1. Open the WhatsApp interaction in the CRM Workspace.
2. Locate the audio message in the conversation thread and use the playback controls (play, pause, seek) to listen.

   Audio messages are stored as a link in the interaction's conversation history attachment. Failed audio uploads or playback errors display an appropriate message.

Record and send a voice message

3. Select the voice recording control in the message input area.

   The recording UI provides start, stop, and cancel controls with recording-in-progress feedback.

4. Record your message and send it to the customer.

   The voice message is delivered in a format supported by WhatsApp. If the recording fails or cannot be uploaded, an agent-facing message describes the error.

Result

Audio messages are exchanged between agents and customers through the NextWave off-Glide pipeline. Audio files are stored as part of the interaction's conversation history.

Set up account linking for WhatsApp on NextWave

Link WhatsApp customers to contact or consumer records automatically or manually within the NextWave off-Glide architecture.

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Before you begin

Role required: *sn_customerservice_admin*

About this task

Account linking connects a WhatsApp customer to an existing contact or consumer record in Customer Service Management. On NextWave, the system supports both manual account linking (an agent verifies and links the customer) and auto account linking (the system matches and links the customer based on predefined criteria without manual intervention).

Procedure

Auto account linking

1. Verify that auto account linking is enabled for the WhatsApp channel.

   When auto account linking is active, the system automatically matches incoming WhatsApp customers to existing contact or consumer records based on the customer's phone number or other configured identifiers. No manual intervention is required.

Manual account linking

2. Open the unlinked WhatsApp interaction in the CRM Workspace.
3. Use the lookup and verify action to search for and select the contact or consumer record that matches the customer.

Result

Linked accounts are accessible to the user as intended. The system maintains integrity and security during account linking processes within NextWave.

Related topics

WhatsApp username-based customer identification

Link a WhatsApp BSUID to a known contact

Supported bot response controls for WhatsApp on NextWave

Bot response controls that Virtual Agent can send to customers through the WhatsApp Direct Integration channel on the NextWave off-Glide architecture.

When a customer interacts with a Virtual Agent topic through WhatsApp on NextWave, the bot can respond with any of the following controls. Controls that cannot render natively in WhatsApp provide a fallback representation.

Bot response controls for WhatsApp on NextWave

Control	Description	Rendering	Fallback
Text	Sends a static or dynamically composed plain text message to the customer. Data pill and variable substitution resolves before sending.	Native WhatsApp text message	None required
LLM-generated text	Sends a message generated at runtime by an LLM based on the conversation context. If generation fails or times out, a fallback message is displayed.	Native WhatsApp text message	Fallback text on failure or timeout

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Bot response controls for WhatsApp on NextWave (continued)

Control	Description	Rendering	Fallback
Card	Presents structured card content to the customer, such as a title, description, and action.	Formatted text representation	Plain text when card cannot render
HTML	Sends rich HTML-formatted content to the customer.	Formatted text where supported	Plain text when HTML cannot render
Image	Sends an image to the customer through the WhatsApp channel.	Native WhatsApp image	None required
Link	Sends a clickable URL to the customer. Clicking the URL opens the intended web page or resource.	Clickable URL in the message	None required
Multi-response	Sends a sequence of multiple response segments to the customer. Each segment is delivered in order.	Sequential WhatsApp messages	None required
Script	Executes a script to generate the response sent to the customer. The script runs at runtime and produces the message content.	Depends on script output type	Depends on script output type
Table	Presents tabular data to the customer.	Formatted text representation	Plain text when table cannot render
Video	Sends a video to the customer through the WhatsApp channel.	Native WhatsApp video	None required

Supported user input controls for WhatsApp on NextWave

User input controls that capture customer responses during Virtual Agent conversations through the WhatsApp Direct Integration channel on the NextWave off-Glide architecture.

When a Virtual Agent topic prompts a customer for input through WhatsApp on NextWave, the following controls are available. Several controls use LLM-assisted matching to interpret natural-language customer responses.

User input controls for WhatsApp on NextWave

Control	Description	Rendering	LLM-assisted
Text input	Captures free-text customer responses. If LLM entity extraction is enabled, the system processes the free-text response to extract relevant entities.	Standard WhatsApp text prompt	Optional (entity extraction)
Boolean	Captures a yes/no (true/false) customer response. Renders as native buttons where the Cloud API supports them, or as LLM-parsed free text otherwise. Ambiguous responses trigger a re-prompt.	Native buttons or text prompt	Yes (natural-language interpretation)

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User input controls for WhatsApp on NextWave (continued)

Control	Description	Rendering	LLM-assisted
Static choice	Presents a fixed, predefined list of options. Renders as a native list-picker or button UI. Unstructured text responses are handled through LLM-assisted matching or a re-prompt.	Native list-picker or buttons	Yes (unstructured text matching)
Dynamic choice	Generates an option list at runtime from a table or reference query. Large option sets are paginated or truncated within WhatsApp Cloud API list-size limits. Empty or failed queries display a fallback message.	Native list-picker	No
Carousel	Presents multiple selectable items as distinct browsable cards with images and text. Large item sets are paginated or truncated according to Cloud API limits. Media items follow WhatsApp size and format constraints.	Browsable card set	No
Input collector	Uses generative AI to collect and structure user data within a conversation flow. Supports multi-turn exchanges within the same collector. Errors or unparseable responses trigger a fallback.	Conversational text prompts	Yes (data collection and structuring)
File picker	Prompts the customer to send a file. Supported file types and size limits are governed by WhatsApp Cloud API constraints. Files that do not meet constraints are rejected with a message to the customer.	File-sharing prompt	No
Grouped choice	Presents a set of categorized or grouped selectable options. Selections are captured and processed as structured input.	Categorized option list	No
Secure text	Requests sensitive information from the customer and masks it appropriately. Sensitive data is captured securely without exposure during input.	Masked text input	No

Integrating LINE with Customer Service Management

Deliver a pre-integrated chat conversation experience with the LINE messaging app for consumers and customer contacts. Integrate LINE with the ServiceNow® Conversational Integration with LINE application.

As an administrator, if you have configured the Conversational Integration with LINE application, your customer contacts and consumers can initiate a LINE chat conversation with a virtual agent or live agent. An agent can initiate a conversation or accept a conversation initiated from a LINE

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chat conversation. You can configure system-initiated messages to be sent to the customer. For more information, see Configure Conversational Integration with LINE.

Note: As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features of the integration include the following:

- Initiate LINE chat conversations with a virtual agent, live agent, or customer.
- Use the chat to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.
- View the LINE chat conversation details from which a work item was initiated in Agent Workspace.
- Indicate your presence in the Agent Workspace Inbox with the Line service channel.
- Make outbound chat conversations to connect with a LINE chat conversation from a customer contact or consumer, and automatically capture interaction details to simplify data entry.

Example workflows

The following example workflow shows the use of the Conversational Integration with LINE application in helping a customer to resolve an issue with the recently purchased router:

1. The customer initiates a LINE chat conversation using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer selects the router as a product and finds knowledge articles associated with it.
4. The customer ends the conversation because the issue was resolved with the help of a knowledge article.

The following example workflow shows the use of the Conversational Integration with LINE application in addressing customer feedback:

1. A customer purchases a new product and opts in to receive notifications from your business on the LINE app.
2. The customer receives a welcome message from customer support.
3. After two months, the customer receives another message asking for feedback on the product.
4. The customer shares negative feedback.
5. An agent reviews the feedback and starts a conversation with the customer to offer help and find out more about the customer's experience with the product.

End users and roles

Users with the roles listed in the following table can use the Conversational Integration with LINE application.

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Roles required for Conversational Integration with LINE

Roles	Tasks
agent_workspace_user	Accept an ongoing LINE chat conversation with a customer through the LINE service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a LINE chat conversation by using interaction records of type **Messaging** and subtype **Line**.
sn_customerservice.consumer, sn_customerservice.customer	Initiate LINE chat conversations with a virtual agent or live agent so that you can search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Integrating Facebook Messenger with Customer Service Management

Integrate Facebook Messenger chat conversations with your ServiceNow® instance so that consumers and customer contacts can communicate with your business using the Conversational Integration with Facebook Messenger application.

As an administrator, if you have configured the Conversational Integration with Facebook Messenger application, your customer contacts and consumers can initiate a Facebook Messenger chat conversation with a virtual agent or live agent. An agent can accept a conversation initiated from a Facebook Messenger chat conversation. For more information, see Configure Conversational Integration with Facebook Messenger.

Note: As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features

Customer experience

Initiate Facebook Messenger chat conversations with a virtual agent or live agent to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.

Agent experience

- View the Facebook Messenger chat conversation details from which the work item was initiated in Agent Workspace after accepting a work item associated with the Facebook Messenger service channel.
- Indicate your presence in the Agent Workspace Inbox with the Facebook Messenger service channel.
- Make outbound chat conversations to connect with a Facebook Messenger chat conversation from a customer contact or consumer and automatically capture interaction details to simplify data entry.

End users and roles

Users with the roles listed in the following table can use the Conversational Integration with Facebook Messenger application.

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Roles required for Conversational Integration with Facebook Messenger

Roles	Tasks
agent_workspace_user	Accept an ongoing Facebook Messenger chat conversation with a customer through the Facebook Messenger service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a Facebook Messenger chat conversation using the interaction record of the type as **Messaging** and subtype as **Facebook Messenger**.
sn_customerservice.consumer, sn_customerservice.customer	Initiate Facebook Messenger chat conversations with a virtual agent or live agent to search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

Example workflow

The following example workflow shows the use of the Conversational Integration with Facebook Messenger application in helping a customer to resolve an issue with the recently purchased router:

1. The customer initiates a Facebook Messenger chat conversation using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer selects the router as a product and finds knowledge articles associated with it.
4. The customer ends the conversation because the issue was resolved with the help of a knowledge article.

Integrating Apple Messages for Business with Customer Service Management

Deliver a pre-integrated chat conversation experience with the Conversational Integration with Apple Messages for Business app for consumers and customer contacts. Integrate Apple Messages for Business by using the ServiceNow® Conversational Integration with Apple Messages for Business application.

As an administrator, if you have configured the Conversational Integration with Apple Messages for Business application, then your customer contacts and consumers can initiate a Apple Messages for Business chat conversation with a virtual agent or live agent. An agent can accept a conversation initiated from a Apple Messages for Business chat conversation. For more information, see Conversational Integration with Apple Messages for Business. Refer to the Apple documentation for more details about Apple Messages for Business.

Note: As an administrator, you can also use any predefined Customer Service Virtual Agent conversations to capture information from customer contacts or consumers. For more information, see Customer Service Virtual Agent conversations.

Key features of the integration include the following:

- Customers can initiate Apple Messages for Business chat conversations with a virtual agent or live agent.
- Use the chat to search for articles in community posts and knowledge articles, access service catalogs, or create a customer service case.

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- View the Apple Messages for Business chat conversation details from which a work item was initiated in Agent Workspace.
- Indicate your presence in the Agent Workspace Inbox with the Apple Messages for Business service channel.

Example workflow

In this example workflow, the Conversational Integration with Apple Messages for Business application is used to resolve a consumer issue:

1. A customer wants to get a replacement credit card, and initiates a Apple Messages for Business chat conversation on iMessage using the Virtual Agent bot.
2. The Customer Service Management application identifies the customer and starts an interaction of type **Messaging**.
3. The customer is presented with a list of credit card options that they own and picks that card that they want to replace.
4. A form opens and asks about the reason for replacement, date lost, address, and phone number. The customer submits the form.
5. The customer selects the iMessage app to schedule the delivery.
6. The replacement card is scheduled to arrive in 3-5 business days.
7. The customer additionally wants to know about home refinance options, and is shown links on refinancing.
8. The customer then selects to chat with a live agent.
9. A live agent schedules a call back with a mortgage specialist. The Customer Service Management application starts another interaction of type **Messaging**.
10. The customer sends feedback on the interaction using the quick reply action.

End users and roles

Users with the roles listed in the following table can use the Conversational Integration with Apple Messages for Business application.

Roles required for Conversational Integration with Apple Messages for Business

Roles	Tasks
agent_workspace_user	Accept an ongoing Apple Messages for Business chat conversation with a customer through the Apple Messages for Business service channel in Advanced Work Assignment.
sn_customerservice_manager	View details of a Apple Messages for Business chat conversation by using interaction records of type **Messaging** and subtype Apple.
sn_customerservice.consumer, sn_customerservice.customer	Initiate Apple Messages for Business chat conversations with a virtual agent or live agent so that you can search for articles in Communities and Knowledge Management, access service catalogs, and create a customer service case.

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Integrating with Process Mining

Integrate Customer Service Management with the Process Mining application to analyze processes relevant to your KPIs, and identify bottlenecks associated with customer service cases.

Important:

Beginning with the Brazil release, the Process Mining Content Pack application is set to be part of the core ServiceNow AI Platform and is automatically installed for Customer Service Management. To auto-install the Process Mining Content Pack application, upgrade your instance to Brazil.

Support for the standalone CSM Process Mining Content Pack (com.snc.csm_process_optimization) ends with this change; it remains active on upgrade, but is no longer supported.

For more information about enabling the Process Mining Content Pack for CSM, see Activate content packs.

End user and roles

If you have the required roles, you can use Analyst Workbench to access the visualized process workflow data, and tools for analyzing data related to customer service cases. For more information, see Overview of the Analyst Workbench.

The following combinations of roles are required for using the Process Mining application with Customer Service Management.

Combinations of roles

Process Mining role	Customer Service Management role
sn_process_optimization_admin	sn_customerservice_manager
sn_process_optimization_power_user	sn_customerservice_manager
sn_process_optimization_analyst	sn_customer_service_agent

Projects included with Process Mining Content Pack for CSM

Several projects are included with the Process Mining Content Pack for CSM (sn_csm_po) that customers can use to get started:

- Case evaluation project: Use this project to evaluate Process Mining and become familiar with the Process Mining capabilities.
- **Long resolution time analysis project**: Use this project to identify bottlenecks to minimize delays in the case flow.
- **SLA Breach Analysis project**: Use this project to identify and analyze customer service cases where service level agreements (SLAs) have been violated.

Optimization project for customer service cases

The Process Mining Content Pack for CSM (com.snc.csm_process_optimization) adds a prebuilt project that includes a predefined **Customer Service Cases** process model definition for customer service cases. By default, the **Customer Service Cases** project filters customer service cases for the last two quarters. You can also configure a new process project based on the prebuilt project. For more information, see Create a project using ServiceNow platform.

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The **Customer Service Cases** process model definition includes default activity definitions and breakdown definitions for customer service cases. Use the definitions as they are or modify them for a custom configuration.

- Use activity definitions to understand state transitions and analyze the linked processes such as Problem (PRB) records. Transitions can include, for example, going from the work in progress state to the solution proposed state.
- Use breakdown definitions to filter records and analyze a process map by categories. For example, you can filter the customer service case data by different channels, products, assignment groups, and locations.

Continual Improvement Management initiative for customer service cases

If the Continual Improvement Management (CIM) application is enabled, the CIM project from the Analyst Workbench can be used to track customer service case improvement initiative progress. The improvement initiative and the process mining model are automatically linked. For more information, see Integration with Continual Improvement Management.

Performance Analytics for customer service cases

If the Performance Analytics application is enabled, the available template configurations can also open the Process Mining application from a Performance Analytics (PA) indicator based on the customer service case data. For more information, see Integration with Performance Analytics (PA).

Process configuration for customer service cases

Select the Process Mining Content Pack for CSM (com.snc.csm_process_optimization) templates to quickly set up projects with pre-configured default settings. Process configurations specify preferences that activate key functionalities within the Process Mining workspace and streamline project setup for cases. Fully configured processes allow users to build projects autonomously and derive insights efficiently, supporting enterprise-wide scalability of process mining. For more information, see Creating process configurations using content pack templates.

Integrating with contact centers

Integrate your contact center platform with the ServiceNow Customer Service Management (CSM) application to unify customer service teams through a single user interface. This integration centralizes routing across departments and channels, and optimizes workforce engagement for more personalized customer experiences and simplified employee experiences.

Contact Center integration overview

Prerequisite: Ensure that agents are set up via configuration through their contact center integration to access the ServiceNow Workspace. The agent profiles are synced automatically when the agent logs in through the contact center connector in OpenFrame. For example, agent John Jason in the ServiceNow workspace must be able to log in to the contact center.

Additionally, the agent presence state must match between the ServiceNow workspace and the contact center. In some cases, the state “available” might have a different name in the contact center environment, “on queue” for example.

Review the following architecture diagram for more insight on the contact center integration flow with ServiceNow.

See Integrating with Computer Telephony Integration (CTI).

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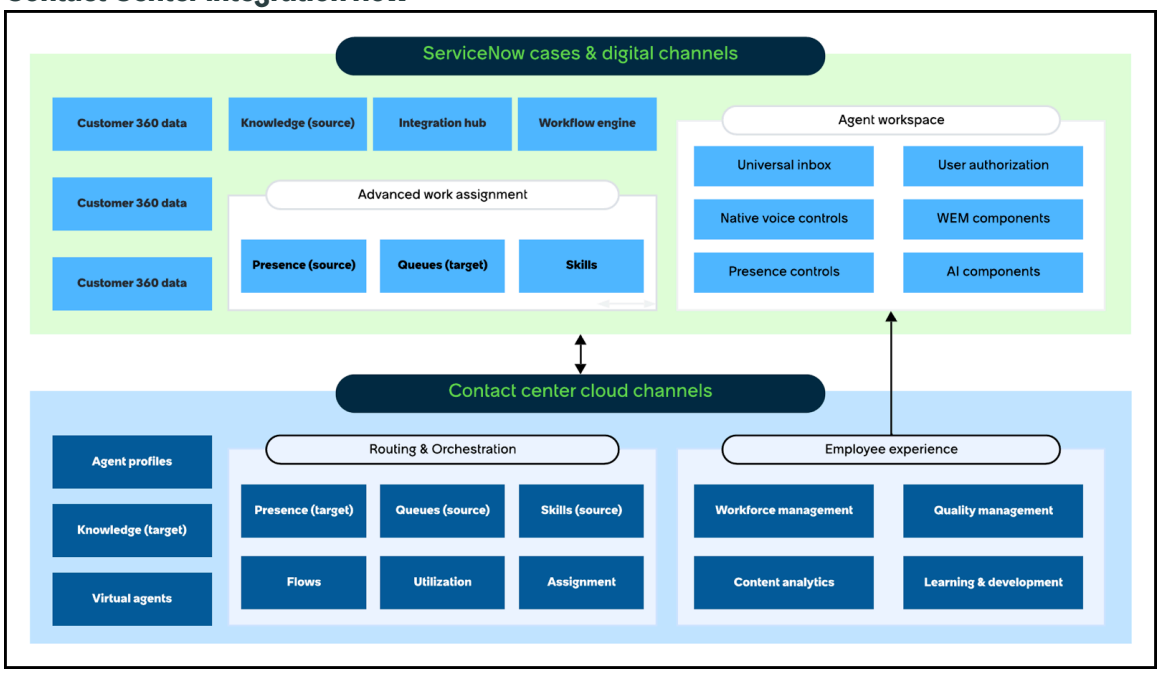
Contact Center integration flow



External routing with Contact Centers

Contact center spokes allow communication between ServiceNow and contact centers via the contact center API. Using a spoke requires the use of Integration Hub, and each contact center provider creates a spoke with actions to initiate the routing instructions. In general, the actions should correspond to these external routing events:

- New interaction
- End interaction
- Transfer to agent
- Transfer to queue

The spoke should also be able to retrieve data, such as skills, queues, and wrap-up codes. To learn more about creating a spoke, refer to Building spokes using Spoke Generator.

The contact center provider uses the AWA Work Offer API to provide the agent target for the work items. This allows the contact center provider to provide parameters to accept conversations, reject conversations, set timeout duration, and set the ServiceNow agent ID. See AWA Offer Work API.

In the ServiceNow platform, you can import contact center platform skills, queues, and wrap-up codes between the ServiceNow instance and the contact center provider.

Contact center integration gives you the ability to route ServiceNow chats, emails, or cases via an external routing platform.

Implementing the integration includes the following high-level steps:

1. Set up the ServiceNow environment, including credentials, the AWA queue, and the OpenFrame configuration.
2. Set up the integration on the contact center side, matching the ServiceNow setup.
3. Create test users and test the integration.

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For specific instructions for integrating with Genesys Cloud, refer to the Genesys Cloud documentation.

For agents

As an agent, you can manage the chat with the customer using the inbox card alert by accepting or rejecting the chat. After accepting a chat, you can continue chatting with the customer through the workspace chat panel.

Agents using the integration can do the following:

- Accept work items.

  Note: If the agent doesn't accept the chat within the configured timeout period, the work items may time out and return to the queue.

- Reject work items
- Transfer to another agent
- Transfer to a queue
- Cancel a transfer to another agent

CCaaS Admin Console

The Admin Console is a tool that administrators use to automate the import of data from CCaaS (Contact Center as a Service) providers into ServiceNow. This integration enhances Customer Service Management by enabling Unified Desktop and External Routing, which improves agent efficiency and customer experience.

Admin Console overview

The Admin Console streamlines the integration of CCaaS providers with the ServiceNow platform, providing a seamless and unified experience for both customers and partners using ServiceNow.

Customer Service Management (CSM)

CCaaS providers can use the following features by integrating with the capabilities through their custom plugins. Review prerequisites and plugin requirements to enable the CCaaS Admin Console. See Plugin requirements for voice and callback integrations with contact centers.

Accessing Admin Console

Access the CCaaS Admin Console in your ServiceNow instance by navigating to **All** > **Contact Center Integration Center** > **CCaaS Admin Console**.

In the Admin Console, admins must enter the provider ID and label for their contact center to establish a connection with their database. This integration allows the contact center to fetch data and import queues, skills, and wrap-up codes into ServiceNow. The process is streamlined using an extension point, enabling CCaaS providers to consistently return provider IDs and labels. This simplifies the integration, reduces manual configuration, and facilitates easy connections to multiple contact centers.

Data Import

The key capability of the Admin Console is importing skills, queues, and wrap-up codes from the CCaaS provider platform into ServiceNow. This ensures data synchronization between

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both platforms for seamless and efficient interaction routing. Queues and skills routing helps direct incoming interactions to the right queue based on agent skills and interaction metadata, ensuring efficient handling of customer queries.

Data import helps customers set up and execute External Routing and Unified Desktop by ensuring data is synchronized across platforms. The Unified Desktop experience allows agents to handle both digital and voice interactions from a single ServiceNow Workspace, eliminating the need to switch between different interfaces and improving efficiency. Customers can choose between different routing engines to manage incoming calls and messages. The routing engine intelligently matches interactions with agents based on skills and experience, ensuring a better customer experience.

For more information, see: Importing skills, queues, and wrap-up codes.

Importing skills, queues, and wrap-up codes

Import the skills, queues, and wrap-up codes that you have configured in your contact center provider to your ServiceNow® instance.

Routing

Skills and queues are a way that admins can route incoming work items to the agent best suited to handle customer inquiries.

Skills

In a contact center, skills are the specific areas of knowledge or expertise that agents have, enabling them to handle certain types of calls or tasks. They can be associated with specific agents or groups of agents. These skills help direct customer inquiries to the agent who can best meet their needs. Common skills include the following:

- Language proficiency
- Technical support
- Product knowledge
- Customer service abilities

By setting up and importing these skills, contact centers can route customer queries to the agents most capable of solving them.

To import skills from your contact center to your ServiceNow® instance, refer to Import skills.

Queues

Queues are systems used to manage and organize incoming customer inquiries. They help calls, emails, or messages get routed to the appropriate agents based on the defined skills and availability. Queues help in distributing the workload evenly among agents and minimize wait times for customers. They can be set up to handle various service channels, such as phone, email, chat, and social media, so that customer interactions are managed efficiently.

To import queues from your contact center to your ServiceNow® instance, refer to Import queues.

Wrap-up codes

Wrap-up codes are labels or categories that agents use to classify the outcome of a customer interaction after it has concluded. These codes help in tracking the nature of interactions and identifying trends or common issues. Wrap-up codes provide insights into the types of customer

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inquiries received, the efficiency of issue resolutions, and areas that need improvement. This information provides insights that help with reporting and analytics.

For example, wrap-up codes can indicate whether a call was for technical support, billing inquiries, or a product return. Accurately assigning wrap-up codes helps data get correctly captured for future reference and analysis.

To import wrap-up codes from your contact center to your ServiceNow® instance, refer to Import wrap-up codes.

Import queues

Import queues from your contact center provider to ensure that customer interactions are routed to the appropriate agents based on their skills and availability.

Role required: admin (sn_ct_ctr_it_core)

Follow these steps in the workflow to import queues from your selected contact center:

Step 1: Select queues

Identify the queues that you want to import from your selected contact center provider.

Step 2: Assign channels

Select queues, assign service channels to them, and import them into ServiceNow.

Step 3: View summary

Review the newly imported queues and the ones that existed before in your ServiceNow instance.

Note: The **Start Over** button resets your current changes and takes you back to the **Select queues** step.

Select queues

1. Navigate to **All** > **Contact Center Integration Center** > **Contact Center Admin Console**.
2. Select a contact center provider to import queues from the dropdown menu for the **Select a provider** field.

   Note: The contact center dropdown menu appears only when multiple providers are configured. If you have just one provider, it's automatically selected and can't be changed.

3. Select the **Import Queues** tab from the navigation pane.

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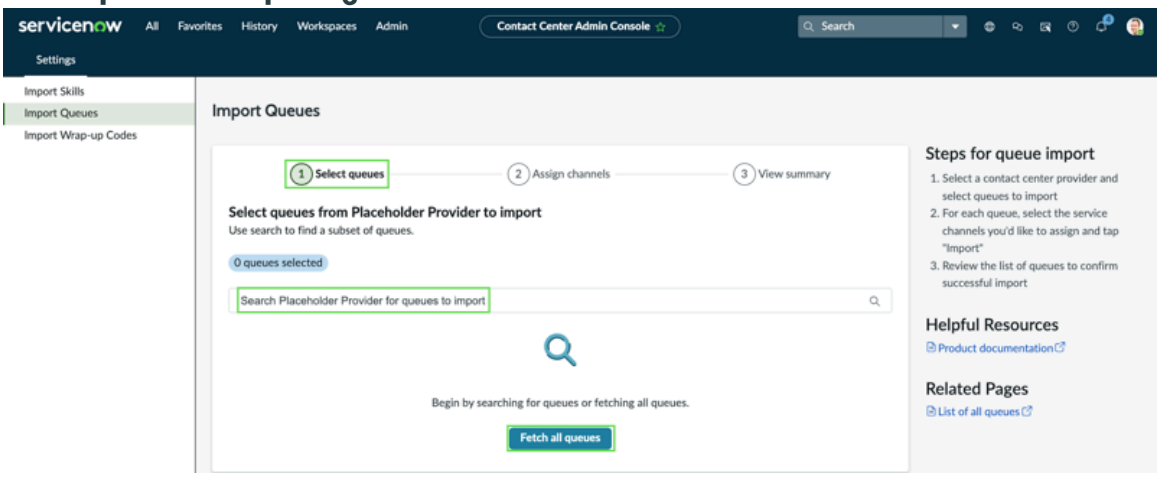
Select queues for importing



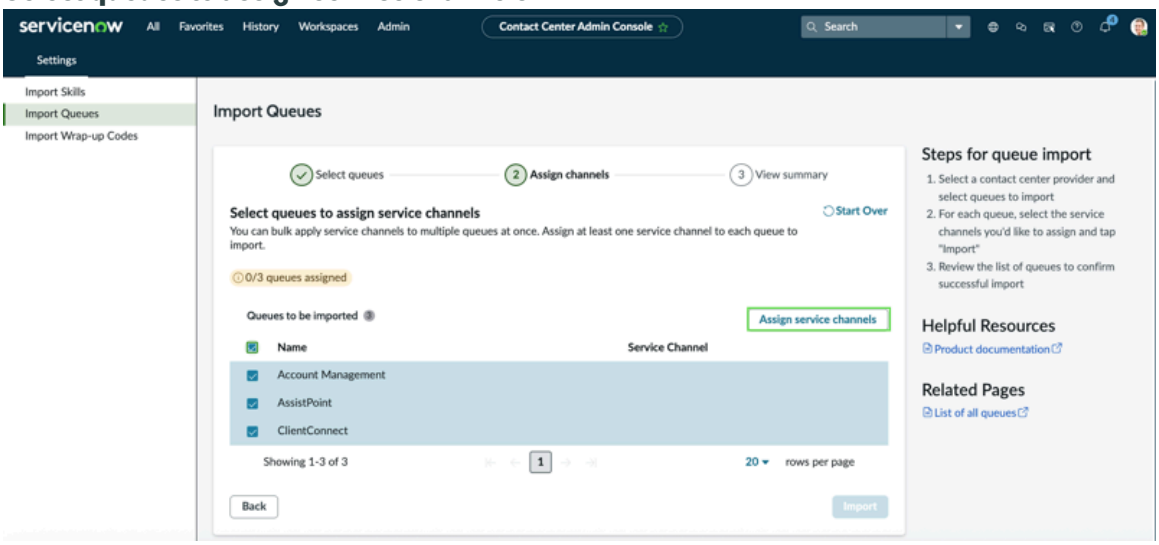
4. Search for specific queues by using the search bar or select **Fetch all queues** to fetch the entire list of available queues.
5. Once you've fetched a set of queues, select the queues you plan to import by selecting the check box next to each queue.

   Note: You can also select all queues by selecting the check box at the top of the list.

6. Select each queue that you want to import and click **Continue**.
7. Proceed to the next step of assigning service channels for your selected queues.

Assign channels

Select queues to assign service channels



1. Select one or more queues from the displayed queues list by selecting the check box next to them.

   Note: You can select all queues by selecting the check box at the top of the queues-list.

2. Select **Assign service channels** to display the service channel modal.

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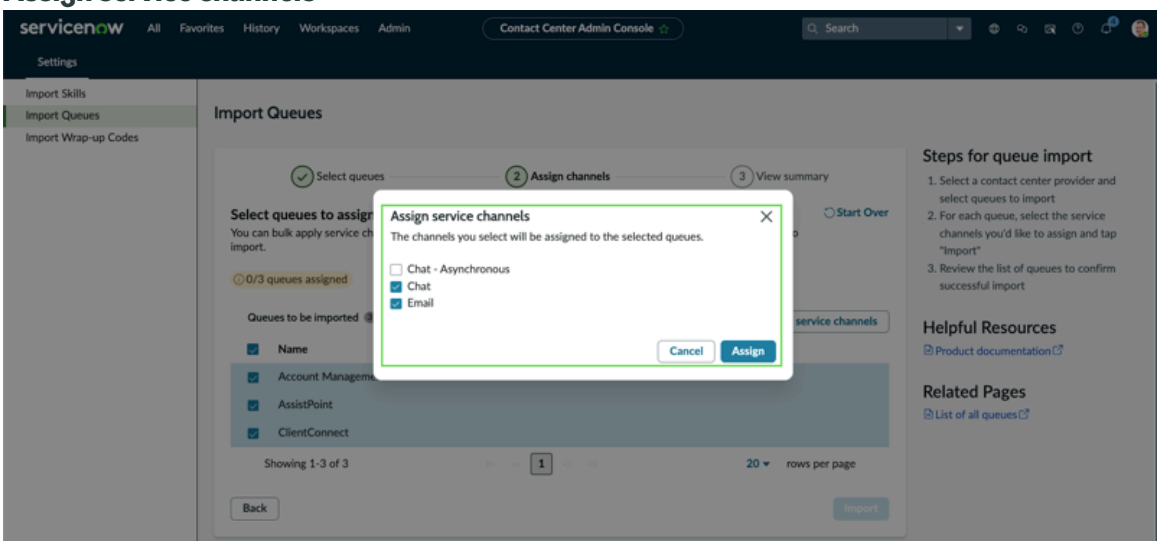
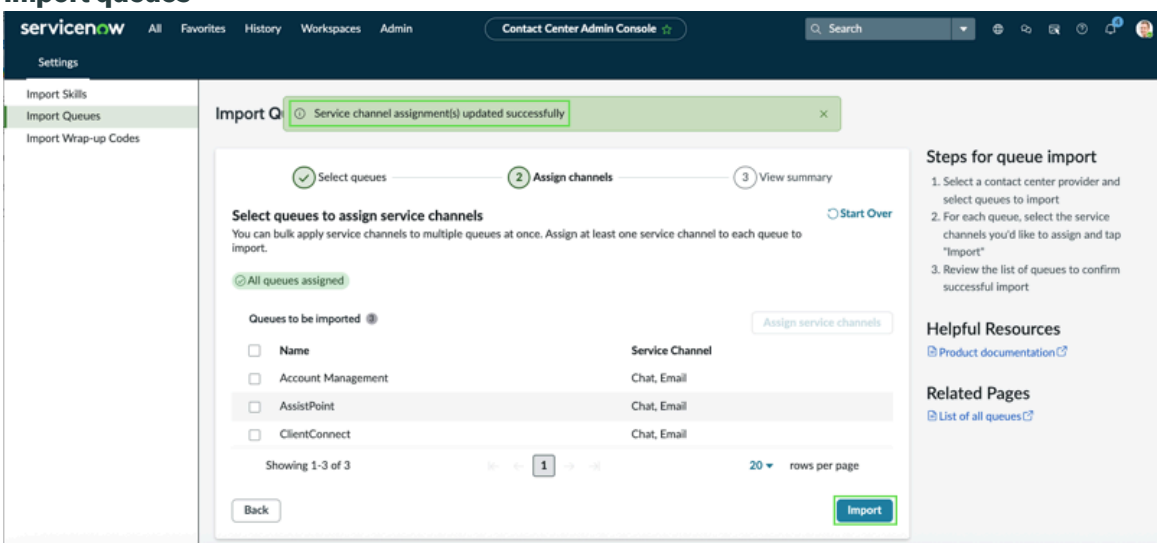
Assign service channels



3. Select one or multiple service channels and assign them to the selected queues.
4. Repeat steps (1) through (3) and confirm that all queues have at least one service channel assigned to them.
5. Select **Import** to begin the import process.

Note: Each pairing of a new queue and service channel creates a unique queue record in ServiceNow.

Import queues



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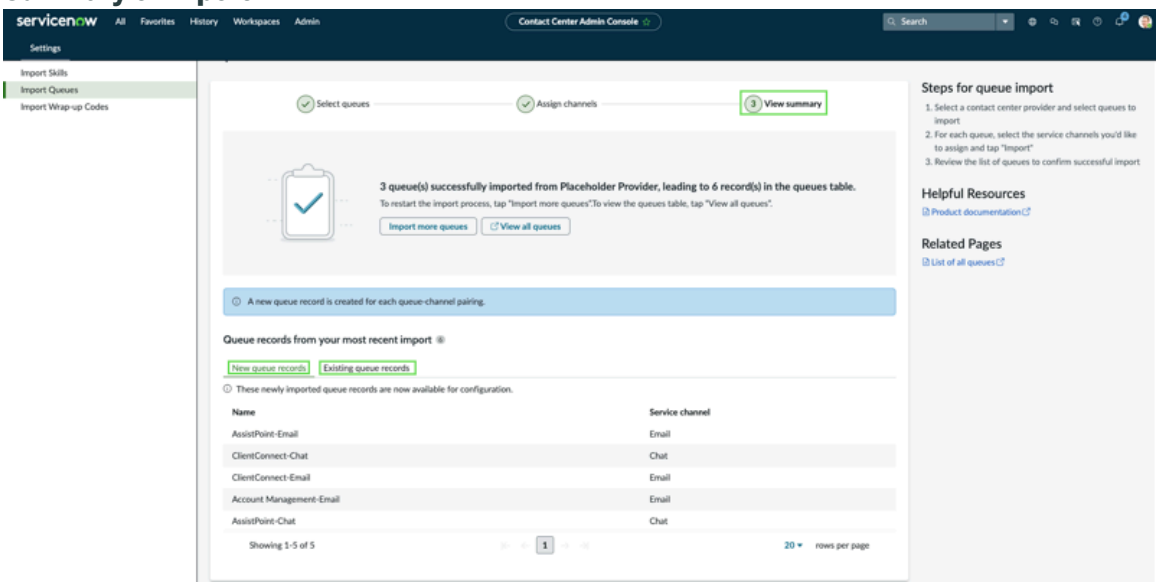
View summary

Summary of import



1. In the **View summary** step, review a summary of your recent actions.
2. Additionally, you can also choose to import more queues or view all queues in the table.
3. Review the list of queues to confirm their successful import.
4. The new imported queues and queues that previously existed are displayed in two separate lists in the confirmation page.

Example: Fetch all queues, assign a service channel, and import all queues

The following example demonstrates how to fetch all available queues, assign the Chat service channel, and import them into ServiceNow.

1. Select **Fetch All** to retrieve all queues from the CCaaS provider.
2. Select all queues using the **Name** field or **Select all item(s)** link.
3. Select **Import** to proceed to the channel assignment step.
4. Repeat step (2).
5. Select **Assign service channels**, then select Chat, and select **Assign**.
6. The refreshed screen shows all queues with the Chat service channel assigned.
7. A banner confirms the successful assignment.
8. Select **Import** to start the import process.
9. Review a summary of your import in the **View summary** step.

Import wrap-up codes

Import wrap-up codes from your contact center provider to ensure that each customer interaction is classified appropriately. For example, you can specify whether a call was for technical support, billing, or a product return.

Before you begin
Role required: admin

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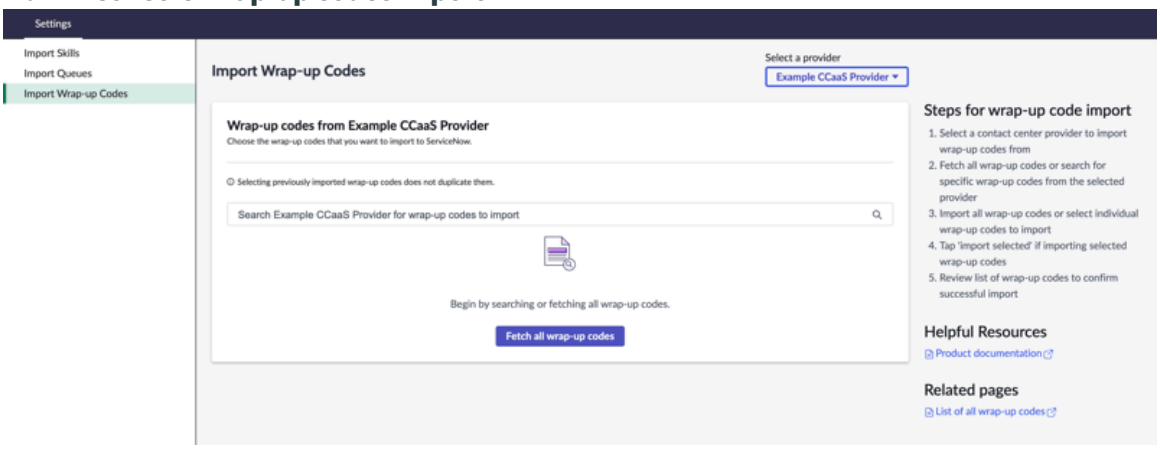
Procedure

1. Navigate to **All** > **Contact Center Integration Center** > **CCaaS Admin Console**

Admin console wrap-up codes import



2. Select a contact center provider to import wrap-up codes from.
3. Either fetch all wrap-up codes or search for specific wrap-up codes from the provider.
4. Import all the wrap-up codes or select individual wrap-up codes to import.
5. Tap **Import selected** to import the wrap-up codes.
6. Review the list of wrap-up codes to confirm that the import was successful.

> **Note:** Newly imported wrap up codes and wrap up codes that previously existed in your ServiceNow® instance are shown in two separate lists on the confirmation page.

Use AI to generate wrap up code and notes summary

ServiceNow Otto automatically analyzes customer interaction transcripts to suggest wrap up codes and generate wrap up note summaries during the Interaction wrap up process. This capability reduces post call tasks while improving documentation quality and consistency.

Wrap up code and notes summary overview

AI-generated wrap up code and notes summary is a ServiceNow Otto capability that transforms the wrap up task from a manual to automatic process. When an Interaction enters the wrap up state, the ServiceNow Otto analyzes the transcript and suggests a wrap up code based on available codes. ServiceNow Otto also generates concise interaction wrap up notes based on the call transcript. Agents can accept the recommendations or enter their own wrap code and note summaries. Organizations can choose between automatically generated content from ServiceNow Otto, or a third-party CCaaS vendor. Alternatively, agents may enter the code and wrap up notes manually.

Admins can configure the feature to make it available for the agents to use.

For more information, see:

- Enable ServiceNow Otto to generate wrap up code and notes summary
- AI interaction wrap-up

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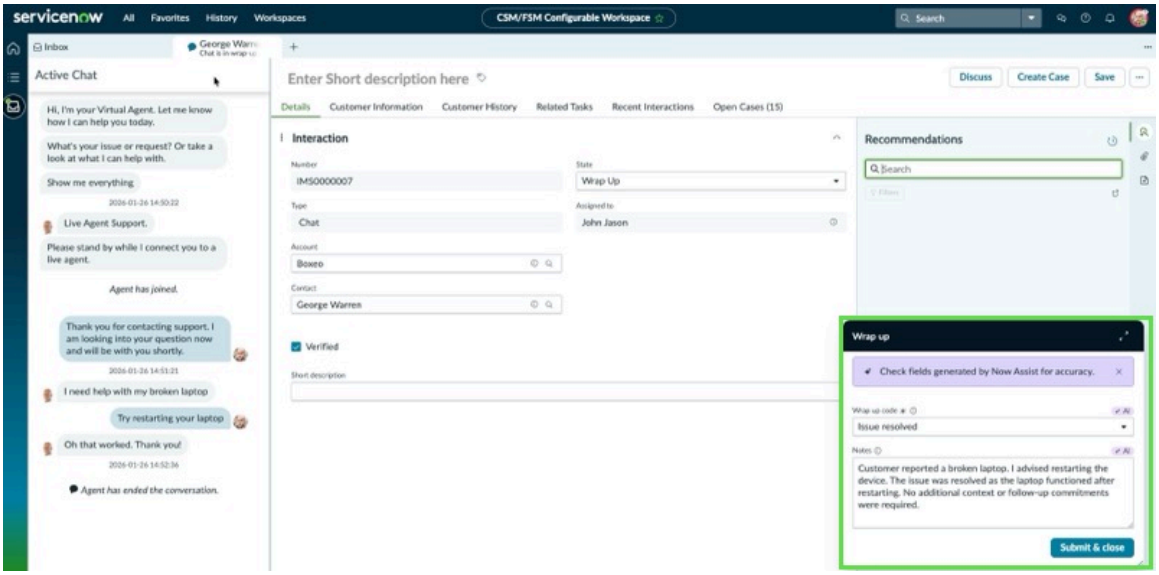

Key Features and benefit

Improved Agent Productivity:

Reduces after-call work time by automating summary writing and code selection. Streamlines the wrap up process with pre-populated recommendations that speed completion of required tasks.

Enhanced data quality and business insights

Ensures standardized, consistent summaries across all interaction notes. Improves categorization accuracy through comprehensive transcript analysis. Enables reliable reporting and trend analysis through consistent wrap-up codes.

Enable ServiceNow Otto® to generate wrap up code and notes summary

Configure ServiceNow Otto® in your ServiceNow instance to enable the feature to automatically analyze interaction transcripts and recommend wrap up codes and generate notes summaries. This configuration allows agents to use AI-generated suggestions during the wrap up process or manually invoke the skill.

Before you begin

After an Interaction ends or is transferred to a new agent, the interaction may enter a wrap up state. During this state, agents must select a wrap up code and enter notes to document the interaction. ServiceNow Otto® can analyze the interaction transcript and recommend an appropriate wrap up code based on the conversation and available wrap up code options. The skill also generates a summary of the interaction to populate the notes field. You can configure the system to automatically generate these recommendations when wrap up begins. Alternatively, you can enable manual generation where agents click a button to invoke the skill when needed. Manual generation gives customers control over token usage by calling the LLM only when requested.

See Use AI to generate wrap up code and notes summary and AI interaction wrap-up.

Role required: admin

Review the following dependencies to verify access to configuration:

- ServiceNow Otto for Customer Service Management (CSM) plugins are installed and activated
- The ServiceNow Otto® for Wrap Up skill is activated in your instance
- Wrap up codes are present in the Interaction Wrap Up Codes table with detailed description

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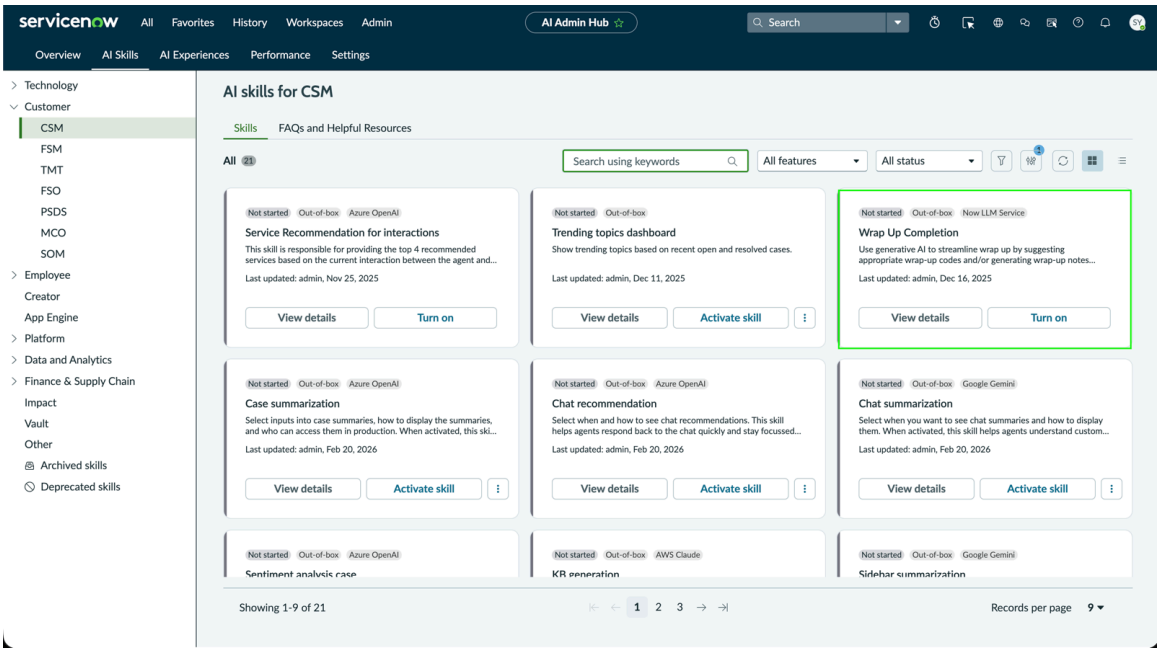
Procedure

1. Verify the ServiceNow Otto® for **Wrap Up** skill is activated:

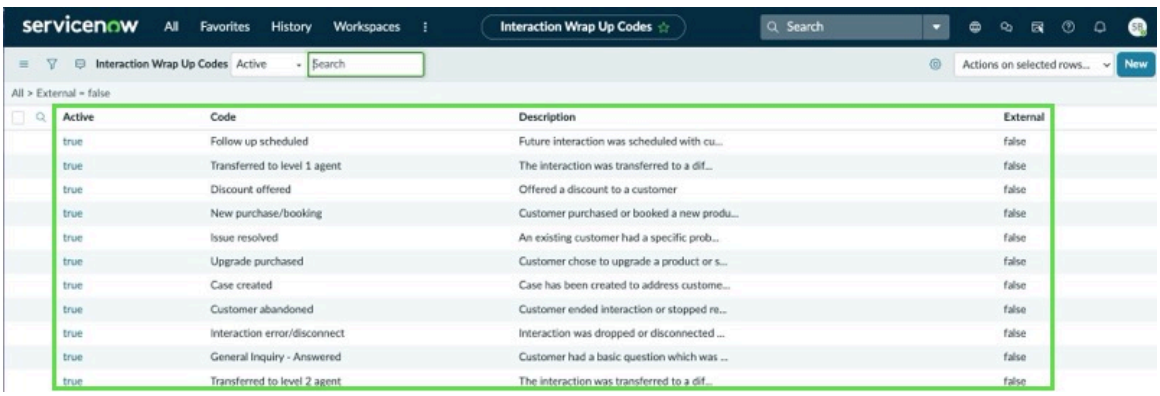


   a. Navigate to **All** > **AI Admin Hub** > **Skills**

   b. In the left panel, navigate to **Customer** > **CSM** to view available ServiceNow Otto® skills.

   c. Locate the **Wrap Up Completion** skill and verify it is activated.
   If the skill is not activated, select the **Activate** button on the skill card.

2. Create wrap up codes with detailed description:



   a. Navigate to **All** > **Interaction** > **Wrap up Codes**.

   b. Create or update wrap up code records with detailed description.
   The skill uses wrap up code description to determine the most appropriate recommendation.
   Detailed description improves the accuracy for the recommendations.

3. Configure wrap up codes for your interaction type:

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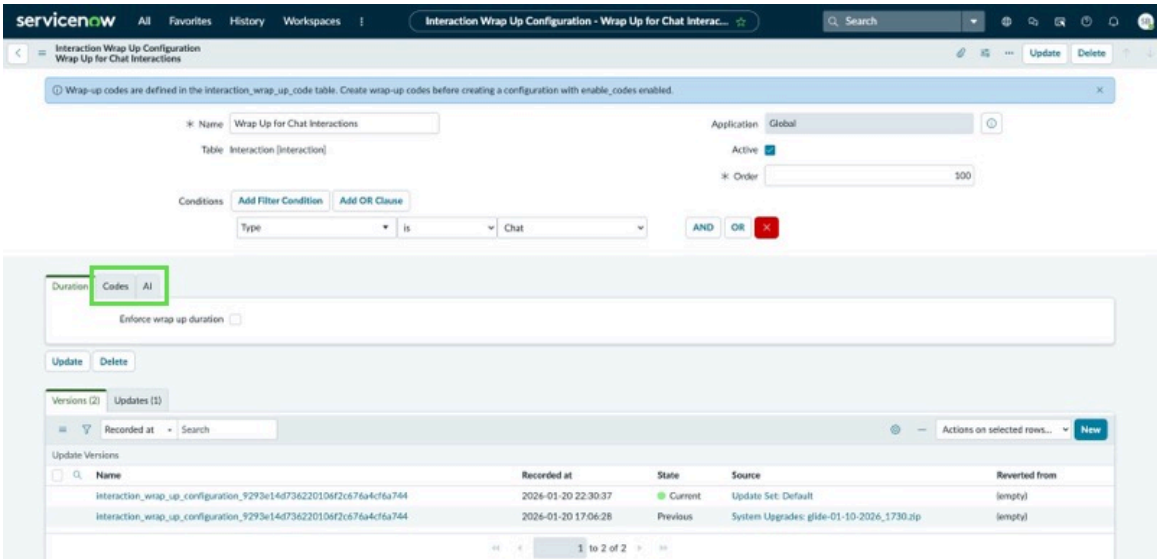

a. Navigate to **All** > **Interaction** > **Wrap Up Configuration** and open the wrap up configuration record for your interaction type.

b. In the **Codes** tab, select the **Enable wrap up codes** checkbox.

c. Select and add the wrap up codes you want to make available for this configuration.

d. In the **Default wrap up code** field, select the code to use if the wrap up timer expires before an agent selects a code.

4. Enable AI capabilities for wrap up configuration:

   a. Select the **AI** tab.

   b. Select the AI capabilities you want to enable:

      - Select **Enable AI code** to auto-populate wrap up codes: Enables AI-generated wrap up code recommendations.
      - Select **Enable AI notes** to auto-populate notes: Enables AI-generated notes summaries.

      You can enable one or both options based on your requirements.

   c. *Select Use AI code as default to automatically submit the AI-recommended wrap up code if the wrap up timer expires.*

   d. Select **Update** to save the configuration.

5. Configure steps to enable the AI-generated method for automatic or manual recommendations:

   a. Navigate to **All** > **System Properties** > **All Properties** and search for: `sn_csm_workspace.auto_generate_ai_wrap_up`

   b. Set the value as required.

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Setting the value to true automatically generates AI recommendations when wrap up begins. Setting the value to false displays a **Run ServiceNow Otto** button that agents select to generate recommendations.

c. Select **Update**.

Setting the property to false allows agents to manage when the skill is invoked and helps manage token usage.

Result

When an interaction enters wrap up state, the system creates an **Interaction Wrap Up Segment** record that maps the interaction, transcript, and wrap up configuration. If automatic generation is enabled, the AI recommendations appear immediately in the wrap up fields. If manual generation is enabled, agents select the **Generate Wrap Up** button to generate recommendations.

Agents can accept the AI recommendations or enter their own values. The **Insert AI notes** button allows agents to restore AI-generated notes if they modify the field and want to return to the original suggestion.

Note: The system never overwrites agent input when displaying AI recommendations.

Import skills

Import skills to assign the right agent to the customer interaction so that customer inquiries can be handled efficiently.

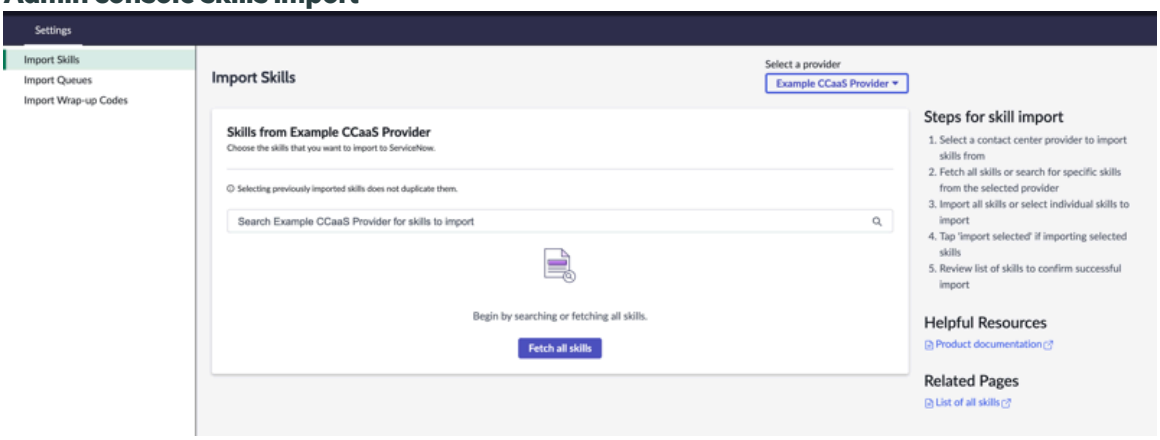
Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Contact Center Integration Center** > **CCaaS Admin Console**

Admin console skills import



2. Select a contact center provider to import skills from.
3. Import all skills or select individual skills to import.
4. Fetch all skills or search for specific skills from the selected provider
5. Tap **Import selected** if imported selected skills.
6. Review list of skills to confirm successful import.

Note: Newly imported skills and skills that previously existed in your ServiceNow® instance are shown in two separate lists on the confirmation page.

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Using Interaction Controls Component (ICC) call controls with Amazon Connect

Agents can access the Active call controls directly from their CRM Workspace to manage phone interactions. This reduces context switching and improves productivity with Amazon Connect.

Amazon Connect for voice calls overview

Amazon Connect integration with ICC provides voice controls enabling agents to handle phone interactions without leaving their Workspace. Call features include actions such as answering, holding, transferring, muting, ending, and accessing the phone directory. Real-time synchronization of agent presence, compliance, and support for various call management features are key achievements of this integration.

To use this feature, complete the steps in the **Enable Interaction Controls** section of the Amazon Connect guided setup for configuring the components. See Integrate ServiceNow Voice with Amazon Connect

Key Features and Benefits of the Amazon Connect integration

Call controls:

Agents can answer, hold, transfer, mute, and end calls directly within their ServiceNow Workspace.

Real-time agent presence updates:

Agent status is automatically updated in real-time based on the Amazon Connect status change.

Access to the phone directory for dialing calls:

Agents can use the phone directory to search for customers to make outbound calls. They can also use it on an active call to search for internal agents to transfer customer calls via Consult or Blind transfer.

An agent performs the following key actions within their Workspace:

Log in to Amazon Connect

Log in to Amazon Connect and set your status to 'available', within your Workspace, and your presence status updates in real-time based on your Amazon Connect status change. You're now available and ready to receive inbound customer calls.

State Presence

Your presence status synchronizes with Amazon Connect. Any changes in your status due to system events or supervisor actions are reflected in real-time within your inbox verifying that your availability is updated.

Note: Presence states values must match between ServiceNow and Amazon Connect to ensure bi-directional synchronization.

Receiving and accepting inbound calls

Use the inbox Alert Card to accept or reject calls. Manage calls via actions such as hold, transfer, mute, or access the transfer target list to transfer calls to other agents or queues. If you're away from your Workspace, the alert times out and sets you in the 'Missed call' status. Change your status back to 'Available' to continue receiving calls. Additionally, you can open or close the phone keypad during an active call.

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After Call Work (ACW)

After Call Work (ACW) refers to the tasks agents complete after finishing a call. It can include documenting the conversation details, updating customer records, or following up on unresolved issues. When you hang up a call, Amazon will put the agent state into ACW. The Agent must change their status from ACW to Available to start getting new calls. To enable the agent to go immediately into the Available state after disconnecting a call, the Amazon Connect admin can set ACW to zero.

Initiating outbound calls

Make outbound calls by using the keypad, phone directory, or click-to-call. You can also use letters corresponding to the numbers in the keypad to make outbound calls.

An outbound call creates an Interaction record that displays in the agent's Workspace displaying the call details.

Transferring a call to an agent or queue

Access the transfer target list with the Active call window to transfer calls to other agents or queues by searching for an agent or queue. Select the contact and begin transferring the call to other agents via Consult or Blind transfer.

When the second agent accepts the call, the first agent can either end the call or continue to stay in the call. If the first agent ends the call after transferring it to the second agent, the call Interaction is ready for wrap-up.

Integrating contact centers with Interaction Controls Component (ICC) for callbacks

The callback interaction feature built on the Interaction Controls Component (ICC) supports callback voice interactions directly within the ServiceNow configurable workspace. The workspace provides agents with callback voice interaction and callback control features in a unified view, resulting in improved productivity and enhanced customer experience.

Callback feature overview

Contact Center platforms provide a callback feature that lets callers keep their place in line and receive a callback when an agent is available. The callback requests are assigned to agents based on the order they are received. Alternatively, callers may select a specific date and time for a scheduled callback. The Callback functionality enables contact centers to reduce hold times and enhance customer experience by enabling customers to request a return call instead of waiting in the queue. This asynchronous communication model helps balance contact center load and improves both customer satisfaction and agent efficiency. The callback routing can be implemented in two different modes, depending on operational goals and infrastructure: Customer-first and Agent-first. These modes dictate how and when a call is established between the customer and the agent during a callback request.

Customer-first mode

In this mode, CCaaS first dials the customer and connects them to an available agent after the customer answers the call.

Callback flow: The callback request is queued. When the callback request reaches the top of the queue and an agent becomes available, the CCaaS dials the customer first. If the customer answers, the CCaaS dials and connects to an agent by routing the call to the agent's inbox in the configurable workspace. If the agent accepts, the call is bridged. This mode reduces unnecessary agent idle time and ensures that an agent is only engaged when a customer answers.

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The following image shows the customer-first mode with an immediate (ASAP) callback request on IVR where a customer is dialed before agent is connected. Agent views the callback interaction as any other normal voice interaction in the CSM Configurable Workspace.

Customer-first mode - Immediate callback request

Agent-first mode

In this mode, CCaaS routes the interaction first to an available agent. The Agent previews the callback context and dials the customer.

Callback flow: The callback request is queued. When the callback request reaches the top of the queue and an agent becomes available, CCaaS routes the interaction to an available agent. The agent accepts the interaction and opens it in ServiceNow configurable workspace. The agent previews the callback context card and then dial the customer. Dialing the customer can be manual or automatic based on a configuration in CCaaS. If the customer doesn't answer, the agent can redial or close the callback interaction.

The following image shows the agent-first mode with immediate (ASAP) callback request on IVR where an agent is dialed before the customer is connected.

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Agent-first mode - Immediate callback request

The Interaction Controls Component (ICC) for callbacks feature enables CCaaS providers to display callback interactions so agents can manage customer calls directly from their configurable workspace. For more information on how to handle CCaaS callback requests, see Manage a CCaaS callback request in the Configurable Workspace and Manage a CCaaS callback request using Global Voice Control.

Note:

To manage and activate the ICC integration for callbacks, see Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations and Plugin requirements for voice and callback integrations with contact centers.

Related topics

Manage a CCaaS callback request in the Configurable Workspace

Manage a CCaaS callback request using Global Voice Control

Callback interaction features

Integrate callback voice capabilities and core contact center functions into Agent Workspace using Interaction Controls Component (ICC) to streamline call handling and enhance the agent experience.

ICC Callback interaction features

The following table shows the Interaction Controls Component (ICC) callback interaction features on the Callback actions component:

ICC callback interaction features within the Agent Workspace

Feature	Description
Callback actions component	
Initiate a call	The Call number button enables you to initiate a call with the customer by dialing the number in the **Callback number** drop-down.

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ICC callback interaction features within the Agent Workspace (continued)

Feature	Description
Redial a number	The Retry call button enables you to redial the number in the drop-down, when the customer doesn't answer. • If the customer answers, resolve customer issue. • If customer doesn’t answer after multiple retries, agents can close the callback. The number of retries is typically left to the discretion of the agent.
Choose a callback number	The drop-down enables you to view the list of the available contact numbers of the customer. You can select any number in the drop-down to connect with the customer.
Close a call request	The Close callback button enables you to wrap up a callback request.
Transfer callback	Enables agents to transfer an ASAP or scheduled callback to another queue or agent before the call to the customer begins.
Manual dial	In manual dial method, agent dials the customer manually after viewing callback context. In this mechanism, the timer doesn’t appear on the Callback actions component.
Automatic dial	In automatic dial, the call automatically gets dialed after the countdown timer reaches zero. Alternatively, the agent can select the **Call number** button and manually dial the call before the timer reaches zero. In this mode, after the call ends, the callback is automatically wrapped up after the countdown timer reaches zero.

In the agent-first mode, the callback interaction page appears with Callback actions component and Callback context card when you accept the callback request in your inbox. In this mode, you can view the callback context card to get the callback request details before making the call. In the customer-first scenario, the callback interaction appears like any other voice interaction and the customer will already be on the call. For more information on these modes, see Integrating contact centers with Interaction Controls Component (ICC) for callbacks.

For more information on how to handle callback requests in the CSM/FSM Configurable Workspace, see Manage a CCaaS callback request in the Configurable Workspace.

When agents are working from an unsupported workspace or they aren’t on the callback interaction page, they can manage callbacks through the Global Voice Control (GVC) component. This feature offers quick access to the Callback Actions component, enabling agents to initiate calls and handle active calls using the available call controls. The features described in the preceding table are available in the Global Voice control (GVC) for easy access to the agent. In addition to these features, you’re provided with an **Open Interaction page** link on the global call list so that you can navigate to the current callback interaction page. For more information on

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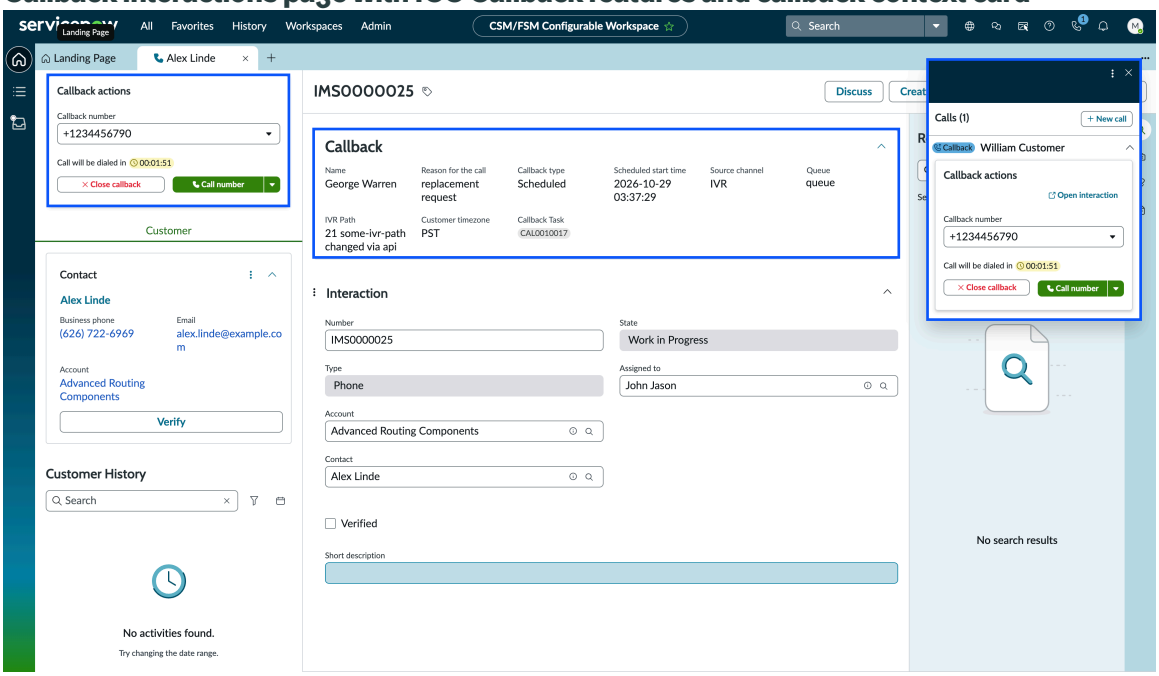
how to use GVC for callback interactions, see Manage a CCaaS callback request using Global Voice Control.

Callback interactions page with ICC Callback features and callback context card



Additional callback features

In addition to the ICC callback features, the following features are available in the callback interactions.

- Callback context card: The callback context card on the Callback interaction page provides the details of the callback request. For more information on the callback context card, see Callback context card.

  This feature uses the Interaction table, which includes a reference to the Callback [sys_cs_callback] table. The Callback table, in turn, references the Callback Context [sys_cs_callback_context] table to store the information related to the callback request.

  Agents with the callback_writer role can edit callback tasks. They can select the appropriate option from the Reason for the call field to manage callback requests effectively for both sales and customer service scenarios.

  For sales-related callbacks, the relevant options in the Reason for the call field are Customer Survey, Sales Discovery, Product Feedback, and Customer Relationship Building. For customer service-related callbacks, the relevant options in the Reason for the call field are Product Issue, Order Issue, Billing Issue, and Other issue.

  In UI Builder, the callback context card is configured to use the Lookup component, which can be used to look up a record on any table in card format. It also uses a data resource that returns the callback task for the specific interaction.

- Preview duration: The preview time measures the time between the agent accepting the callback in their inbox and the agent dialing the customer from the CSM/FSM Configurable Workspace. You can view the preview time in the Interaction table.
- Callback list: You can view the callback interactions assigned to you by navigating to the My callbacks list on the List page of the CSM/FSM Configurable workspace.

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Related topics

- Implement the Interaction Controls Component (ICC) for contact center voice call and callback integrations
- Plugin requirements for voice and callback integrations with contact centers
- Integrating contact centers with Interaction Controls Component (ICC) for callbacks
- Manage a CCaaS callback request in the Configurable Workspace
- Manage a CCaaS callback request using Global Voice Control
- Components installed with Omnichannel Callback

Using Customer Service Management

Agents and managers can use Customer Service Management application to create cases for customers, route cases to agents with the required skills and availability, manage customer information and case activity, and connect with other applications and departments to assist with case resolution.

Manage cases Find tools for creating cases, interacting with customers, and resolving questions and issues	**Manage schedules and sites** Find tools for managing your calendar, using the mobile app to manage work, and plan install base tasks.	**Automate and optimize** Find tools to automate your work, and use AI tools to streamline cases.
Agent management Manage tasks and schedules for agents on your team.	**Customer management** Oversee customer-related tasks, including location and access management, handling contracts and entitlements, managing social media, and outsourcing customer service.	**Customer communication** Learn about tools for portals and case deflection. Find examples and information on using self-service tools and contacting agents for assistance.

Manage cases

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Efficiently manage customer and consumer interactions by creating, assigning, and resolving cases received through various channels like chat, email, and calls.

Use advanced tools, configurable workspaces, and knowledge resources to streamline workflows, and ensure personalized and timely support.

Manage schedules and sites

Manage agent schedules, customer service cases, and install base plans using tools like agent calendars, Microsoft Outlook integrated with CSM, and the CSM mobile app.

You can get real-time updates, streamlined collaboration, and service contracts to enhance customer service efficiency and support.

Automate and optimize

Integrate Virtual Agent for automation and Proactive Customer Service Operations for early issue resolution. Use Task Intelligence, Guided Decisions, and Playbooks to streamline case management.

Agent management

Agent Management involves recruiting, training, and monitoring agents to improve customer service. Key tasks include time entries, case assignment, managing special handling note, chat support and overseeing outsourced service provider tasks.

Customer management

Streamline customer access, contract management, and social media integration to enhance service efficiency. Support B2B2C models for better customer relationships and improve workflows across multiple service channels.

Customer communication

Optimize customer service with Playbooks, reducing resolution time and guiding users through tasks. Empower customers with seamless service via auto-responders, omnichannel callbacks, and personalized portal experiences for faster, smarter support.

Manage cases

Case management within provides a structured and efficient approach to handling a wide variety of service requests, incidents, and inquiries. It encompasses the processes and tools used to manage individual cases from initiation through resolution, ensuring that service delivery is consistent, timely, and aligned with organizational goals.

Manage cases for Customer Service Management

Application or feature	Description
Create customer service cases	• Create a customer service case- Customer service agents and agent managers can create cases using the Customer Service Management application. • Create a customer service case of a specific type-Customer service agents can create different types of cases by making selections from the case type selector.

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Manage cases for Customer Service Management (continued)

Application or feature	Description
	• Create a customer service case from a chat- If a customer chat results in the need to open a case, create the case directly from the conversation.
Assign a customer service case	Agents can assign cases to themselves or to other customer service agents.
Create a task for a customer service case	Create a task for a customer service case for additional work that needs to be completed as part of resolving the case.
Create a case task of a specific type for a customer service case	Customer service agents can create different types of case tasks by making selections from the case task type selector screen.
Create a work order for a customer service case	Create a work order for a customer service case as part of the case resolution process.
Create a request on behalf of a customer or consumer	Customer service agents can create requests on behalf of customers from CRM Workspace or from the platform interface.
Close a customer service case	Close a case at any time, except when it is in the Resolved state.
Create a consumer case	• Create a consumer case from a chat- If a consumer chat results in the need to open a case, create the case directly from the conversation. • Create a consumer case from an anonymous chat- If an anonymous chat results in the need to create a consumer case, create the case directly from the conversation.
Create a consumer record	• Create a consumer record- Consumer service agents and managers can create consumer records from the Customer Service Management application. • Create a consumer record from an anonymous chat- If an anonymous chat results in the need to create a consumer record, create the record directly from the conversation.
Create additional consumer addresses	Consumers can have multiple addresses, including one primary address.

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Manage cases for Customer Service Management (continued)

Application or feature	Description
Respond to a case using an email quick message	Use predefined quick email messages to quickly draft replies to customers. Agents can select predefined quick messages to add content into the message body of emails.
Initiate a conference call from a case	As part of resolving a customer service case, you can initiate a conference call between involved users.
Use the Activity Stream	Enhancements in the Activity stream help reduce cluttering in the Activity stream and reduce the agent effort to understand the case context.
Resolve cases with knowledge and community content	Enable agents to resolve a case more quickly by searching for information from the knowledge base and community and, if helpful, associating it to the case.
Manage skills for a customer service case	Add or remove optional and mandatory skills for a customer service case.
Using Chat Zoom Connector	As an agent you can initiate a Zoom meeting from a chat to understand and resolve customer issues faster through live interactions.
Using CSM Configurable Workspace in Customer Service Management	Use CSM Configurable Workspace to interact with customers, create and work on cases, and resolve questions and issues.
Using Business Location 360	Enable customer service agents to get a comprehensive, 360-degree view of the business location issues, so that they get the required contextual data to effectively resolve the reported issues within the Customer Service Management (CSM) application.
Outsourced Service Provider agent tasks	Outsourced service provider agents extend the capabilities and reach of an organization's customer service operations by providing basic customer service to customers and consumers.

Create a customer service case

Customer service agents and agent managers can create cases using the Customer Service Management application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

Note: Apart from these roles, contributor roles also can create cases. To learn more, see Contributor user roles.

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Procedure

1. Create a case.

Option	Description
CRM Workspace	From the Interaction form, select **Create Case**.
Platform interface	Navigate to **Customer Service** > **Cases** > **Create New**. You can also create cases by: ○ Selecting **New** from the Customer Service Cases list. ○ Selecting the Create New Case related link from any of the entities that can be associated with a case, such as accounts or products.

2. On the Create Case form, fill in the fields.

   To learn more about the fields on the Case form, see Case form

3. Select **Submit**.

Result

If available, the following information is associated with a newly created case:

- The name of the contact and the contact's company
- The product and contract details
- The SLA and entitlements

Create a customer service case of a specific type

Customer service agents can create different types of cases by making selections from the case type selector.

Before you begin

Role required: sn_customerservice_agent

About this task

The types of cases that agents can create depend on the configuration of the customer service case types and service definitions features. For more information, see the following topics:

- Configure customer service case types
- Manage customer service case types
- Configuring service definitions

In CRM Workspace, agents use the Case type selector to make selections and create cases.

Note: In the Core UI, use the Case interceptor to make selections and create a case.

Procedure

1. Create a case by selecting one of the following actions.

   The case type selector appears by default with the options the agent has for creating a case in the context of the record.

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Note: The `sn_csm_case_types.enable_service_selector` property which enables the case type selector is set to true for zBoot customers, and can be enabled for upgrade customers.

Agent action field description

Agent action	Description
Select **New**	Select this action from case lists and case type lists including the following: ○ Related lists: child case, case task ○ List view ○ Case task list view
Select **Create Case**	Select this action from the following records: ○ Interaction ○ Account ○ Contact ○ Consumer ○ Sold Product ○ Install Base Item

2. Make selections from the version of the case type selector that has been configured by the system administrator.

Case selector version field description

Version	Steps
Multi-select	**a.** Select a **Case Type**. **b.** If desired, select an optional category and subtype to narrow the available choices. **c.** Select **Create Case**. **Note:** If a subtype hasn't been configured for a case type, the field for the subtype is not displayed.
Single-select	**a.** Select a **Case Type**. **b.** Select **Create Case**.
Product Service Select	**a.** Enable or disable the **This case is for an owned product** check box. This check box controls the display of the **Product** field **b.** If displayed, select a **Product**. **c.** Select a **Service**.

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Version	Steps
	d. Select a **Case type**. **e.** Select **Create Case**.

3. Fill in the fields on the Case form.
   For more information about these fields, see Create a customer service case.
4. Select **Save**.

Create an onboarding case

Create a case to onboard new customers or to onboard existing customers for new products.

Before you begin

Role required: sn_customerservice_agent

About this task

Onboarding cases appear in the Onboarding Cases module and use the ONB prefix in the case number. For example, ONB0001007.

If the case playbook for onboarding is available, you can use the playbook to guide you through the steps that need to be completed to resolve onboarding cases.

Procedure

1. Create a case.

Interface	Description
CRM Workspace	From the Interaction form, click **Create Case**.
Platform	Navigate to: **Customer Service** > **Cases** and click **Create New**.

2. Select the case type.

Interface	Description
CRM Workspace	In the Select Case Type popup window: **a.** Select a **Case Type**. **b.** In the **Category** field, select Customer On boarding. **c.** Click **Create Case**.
Platform	Select Customer Onboarding in the list of available case types in the interceptor.

3. Add the customer information.
   - If the onboarding case is for an existing customer, fill in the **Account** and **Contact** or **Consumer** fields.
   - If the onboarding case is for a new customer, enable the **New customer** check box and fill in the fields in the New Customer Information form section.

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Field	Description
Customer type	The type of customer, either Business or Indi vidual.
Business name	The name of the business. This field is dis played and is required when you select Busi ness as the customer type. **Note:** You can enter customer names in this field but not partner names.
User name	The name of the contact or consumer. This field is displayed and is required when you se lect Individual as the customer type.
Email address	The email address for the user. This address is used for notifications.
Phone number	The phone number for the user.

4. **Optional:** Add additional members to the case from the **Additional Members** related list. Use this related list to create the users or business entities that should be included in the onboarding case. Click **New** and fill in the fields on the Related Party form.

Field	Description
Type	Use the **Type** field to select the authorization type of the additional member. Example au thorization types include: ○ Joint Owner ○ Signatory ○ Beneficiary ○ Sub Account Additional members can be accounts, con tacts, or consumers. The selection in the **Type** field determines which of the following fields is displayed: ○ User ○ Consumer ○ Account
User	The name of the contact being added as an additional member.
Consumer	The name of the consumer being added as an additional member.
Account	The name of the account being added as an additional member.

5. Fill in the fields on the Case form.
   For more information and field descriptions, see Create a customer service case.

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6. Click **Save**.
   - If the **New customer** check box is enabled, the **Account** and **Contact** or **Consumer** fields are not required to save the case.
   - If the **New customer** check box is disabled, the **Account** and **Contact** or **Consumer** fields are required to save the case.

Create a record in CSM Configurable Workspace

Create a record in CSM Configurable Workspace from the Record tab menu.

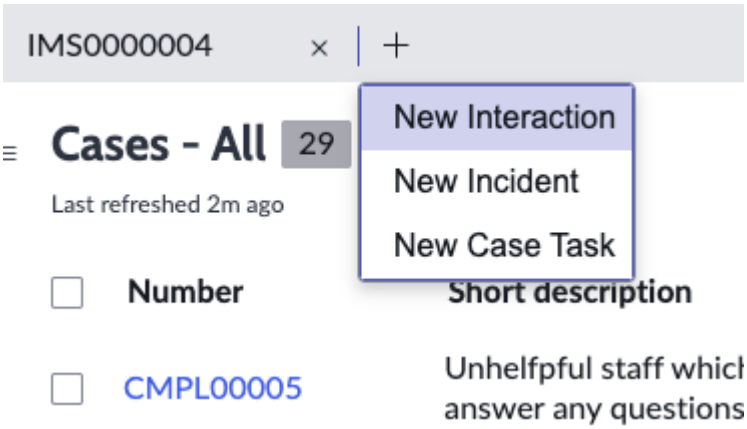
Before you begin

Role required: sn_customerservice_agent,sn_customerservice.consumer_agent

About this task

You can create records from the Add tab in CSM Configurable workspace. Select the plus sign (**+**) icon on the Add tab to see the list of records that can be created.

Record creation from Add tab



Users with the system administrator role can configure the types of records that appear in this list. The default is an interaction record. For more information about configuring the records that can be created from the Add tab, see Configure record creation from the new tab menu in Service Operations Workspace.

Procedure

1. In CSM Configurable Workspace, select the plus sign icon (+) icon on the Add tab.
   If you can create more than one type of record, the system displays a list of the available record types. For example, **New Interaction** or **New Incident**.

   Note: If you can only create one type of record, the system displays a blank form of that record type.

2. Select the type of record to create.
   The system displays a blank form of that record type in the tab.
3. Fill in the fields on the record form.
4. Select **Save**.

Create a customer service case from a chat

If a customer chat results in the need to open a case, create the case directly from the conversation.

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Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

When you create a customer service case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

> **Important:**
>
> Starting in Utah, Connect Support has been deprecated and is no longer supported or available for new activation. For similar capabilities, please move to Advanced Work Assignment and Agent Chat. For details, see Move from Connect Support to Advanced Work Assignment and Agent Chat.

Procedure

1. Navigate to **All** > **Connect** > **Connect Support**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon ( ).
3. Under **Cases**, open a customer service conversation.
4. At the bottom of the conversation, click the menu icon ( ) to open the Connect actions menu.
5. In the Connect actions menu, select **Create Case**.
   The system opens a new case form in a record tab and automatically fills in some fields based on conversation details.
6. Complete the form as necessary and click **Submit**.
   Any comments or work notes in the record conversation appear as comments on the incident form. Work notes do not appear in the chat for the ESS user. The chat agent can select whether a message is a Comment or Work Note in the conversation.

   a. In the record conversation, by the text entry field, click the message type icon ( ).

   b. Select **Comment** or **Work Note**.

   c. Enter a message.
   By default, record conversation messages are added as comments.

   > **Note:** If you add an attachment to a record conversation, it is attached to the underlying record as well.

   The system automatically shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table. Any new journal fields added to the record do not appear in the chat. The system also changes the document ID for the conversation to reference the incident number instead of the entry in the Chat Queue Entry table.

Related topics

Connect workspace

Assign a customer service case

Agents can assign cases to themselves or to other customer service agents.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

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About this task

The **Assign to me** button is only visible if the current user has the customer service agent role and is not already assigned to the case.

Procedure

1. Open a customer service case.
2. Assign the case.

Option	Description
Assign the case to yourself	Click **Assign to me**.
Assign the case to another agent	Select an agent in the **Assigned to** field.

The agent's name appears in the **Assigned to** field. If the agent also belongs to an agent group, the group name appears in the **Assignment group** field.

Create a task for a customer service case

Create a task for a customer service case for additional work that needs to be completed as part of resolving the case.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

When you create a task, the system uses information from the case to automatically fill in fields on the Case Task form. After you create and save a task, it appears in the **Tasks** related list on the Case form.

Procedure

1. Open the desired case.
2. From the **Tasks** related list, click **New**.
3. Fill in the fields on the Case Task form.

Case Task form fields

Field	Description
Number	The automatically assigned case task number.
Parent case	The number of the parent case. This can be a case from the Case [sn_customerservice_case] table or any child tables of the Case table.
Parent	The number of the parent record if the task is created from a type of record other than a case. This field is populated when a case task is created from a non-case record such as an incident, problem, change, or request. This field is a reference to the Task [task] table.

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Field	Description
	Note: You may need to configure the case task record to display the **Parent** field. For more information about adding fields to a form, see Configuring the form layout.
Contact	The contact for the parent case. This field is a reference to the Contact [customer_contact] table.
Account	The account for the parent case. This field is a reference to the Account [customer_account] table.
Consumer	The consumer for the parent case. This field is a reference to the Consumer [csm_consumer] table.
Subject	The subject of the case task.
Description	A description of the work that needs to be done in order to complete the case task.
Priority	The assigned priority of the case task: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low (default)
State	The current state of the case task: ○ Open ○ Closed
Assigned to	The assigned user.
Service Definition	This field is a reference to the Service Definition [sn_case_type_selection] table.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.
Work notes	Information about the case task, such as steps taken toward resolution. Internal users who have been added to the **Work notes list** receive a notification when work notes are added to a case task.
Additional comments	Customer-viewable comments. Each comment is inserted into the **Activity** field when the user selects **Post**.

4. Click **Update**.

Create a case task of a specific type for a customer service case

Customer service agents can create different types of case tasks by making selections from the case task type selector screen.

Before you begin

Role required:

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- sn_customerservice_agent
- sn_customerservice.consumer_agent
- sn_customerservice_manager
- sn_customerservice.svc_location_agent
- sn_customerservice.case_task_agent

About this task

The types of case tasks that agents can create depends on the configuration of the customer service case types and service definitions features. For more information, see the following topics:

- Configure customer service case types
- Manage customer service case types
- Configuring service definitions

In CRM Workspace, agents use the Case type selector screen to make selections and create cases.

Procedure

1. Create a case task.
   - Select **New** from a case task list.
   - Select **New** from the Tasks related list tab on a case record.
   - Select the **+** icon on the related records task list in the Dynamic Related Records component.
   - Select the Task declarative action on the activity viewer.
   - Select **Create Task** in a case playbook stage.
2. Make a selection in the case task type selector.
   - If you create the case task from a case task list, the **Service task** field on the case task type selector shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
   - If you create the case task from a case record, the **Case task service** field lists the task services related to the case service. If the case has no service, the **Service task** field shows all of the related services where the target table is Case Task [sn_customerservice_task] and extensions of Case Task.
3. Select **Create task**
   The case task is created with the selected task service definition. If any default values have been defined in the case task service definition, these values are populated on the case task record.

Create a work order for a customer service case

Create a work order for a customer service case as part of the case resolution process.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

After a work order is created, it appears in the **Work Orders** related list on the Case form. The case number is also referenced on the work order.

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Procedure

1. Open the desired case.
2. From the **Work Orders** related list, click **New**.
3. Fill in the fields on the Work Order form.
   For more information, see Create a work order.
4. Click **Update**.

Related topics

Manage work orders

Create a request on behalf of a customer or consumer

Customer service agents can create requests on behalf of customers from CRM Workspace or from the platform interface.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

Customer service agents can browse the catalog and make a selection to create a request on behalf of a customer.

- From CRM Workspace, agents can create requests from case and interaction records.
- From the platform interface, agents can create requests from case records.

Procedure

1. Open a customer service case.
2. To create a request, do one of the following.
   - CRM Workspace: Click the More UI Actions icon (···) and select **Create Request**.
   - Platform interface: Click the form context menu icon and select **Create Request**.
3. Select an item or a service from the catalog to display the item page.
4. **Optional:** Select the quantity.
5. To complete the request, do one of the following.

Interface	Action
CRM Workspace	Complete these steps: **a.** Click **Order Now**. **b.** Add or change the information in these fields on the Order Confirmation pop-up window: **Request for**, **Delivery information**, **Special instructions**. **c.** Click **Checkout**. The system creates the request and displays the request number. Click **View Details** to open the request record.
Platform interface	Click **Order Now**.

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Interface	Action
	The system creates the request and displays the request number. An information message provides a link to the case associated with the request.

6. From the Case form, click the **Requests** related list to see the requests associated with the case.

Case and account escalation

Use the case and account escalation feature to highlight specific cases or accounts and raise awareness of important customer issues.

Escalating cases or accounts facilitates communication about an issue and enables users to track progress toward a resolution. An escalation provides increased attention to a customer issue and provides a way to track the progress made in resolving the issue. Escalation is an internal process that is not exposed to customers. For more information, see Case and account escalation overview.

Users with the escalation requester role can request and manage case and account escalations. Users with the de-escalator role can de-escalate cases and accounts. Users with the Account Data Manager (sn_crm_account_data_manager) and Escalation Administrator (sn_crm_escalation_admin) roles can request, manage, and de-escalate account escalations.

Related topics

Case and account escalation

Escalate a case or an account

Users with the escalation requester role can escalate a case or account.

Before you begin

Role required:

- sn_customerservice.escalation_requester, sn_customerservice.deescalation_requester or sn_crm_escalation_admin to escalate a case.
- sn_customerservice.escalation_requester, sn_customerservice.deescalation_requester, sn_crm_escalation_admin, or sn_crm_account_data_manager to escalate an account.

Procedure

1. Navigate to the desired case or account.
2. Click the **Escalate Case** or the **Escalate Account** related link.
3. Fill in the fields on the Escalation form, as needed.

Escalation form fields

Field	Description
Number	The number automatically assigned to the escalation request.
Source Record	The case or account for which escalation is requested.

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Field	Description
Request Source	The source of the case escalation request: ○ **Customer** ○ **Internal**
Reason	The reason for requesting the case escalation: ○ **Inactivity** ○ **Lack of Progress** ○ **Customer Imposed Deadline**
Escalation Severity	The escalation severity associated with this escalation, which defines the severity level for the escalation and the color used to highlight the escalated record in the user interface. ○ **High Severity**: escalated records are highlighted in red. ○ **Medium Severity**: escalated records are highlighted in orange.
Escalation Template	The escalation template selected by the user who requested the escalation.
Watch List	The watch list for this escalation record. The watch list includes users on the escalation template and any users that you add for this record. For account escalations, you can **Add account team members to watch list**.
Assignment group	For account escalations, the assignment group for this account escalation.
Assigned to	For account escalations, the customer service agent assigned to this account.
Request By	The user who requested the escalation.
Escalation Justification	Additional information that explains why this escalation is needed.

4. Click **Submit**.
   If the escalation template includes an approval flow, the approvers review the escalation request and either approve or deny the request (provide a reason). Once the escalation request is approved, the customer is notified.

   Note: Multiple escalations cannot be created for the same case.

   For more details see, Case and account escalation.

Manage an escalated case or account

Manage and document the progress for an escalation using the case or account escalation record.

Before you begin

Role required:

- sn_customerservice_agent or sn_customerservice.consumer_agent to escalate a case.
- sn_customerservice_agent, sn_customerservice.consumer_agent sn_crm_escalation_admin, or sn_crm_foundation_admin, to escalate an account.

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About this task

Perform tasks such as changing the escalation severity (which may trigger a different SLA), update the escalation trend, add or remove users from the watch list, and add comments.

- **Case escalations**: When managing a case escalation, the customer service agent typically performs most of the problem resolution work directly in the case record and the escalation record is primarily used for status reporting purposes. For example, updating the escalation trend and comments to escalation stakeholders. All updates to the case escalation record are automatically replicated to the case record as work notes. The escalation SLA is also associated with the case record rather than the escalation record because that is where the agent provides regular updates.
- **Account escalations**: For account escalations, the escalation record takes on a more important role because account escalations are more serious and are often associated with multiple underlying cases. An account escalation is typically assigned to an account escalation manager who works closely with multiple case owners to resolve the customer escalation. The account escalation manager can consolidate the status across the underlying cases and provide regular updates using the escalation record. Therefore, the SLA is associated with the escalation record.

Procedure

1. Navigate to the list of case and account escalation records by selecting **All** > **Customer Service** > **Escalations** > **All**.
2. Select the desired case or account escalation record.
   The **Source Record** field provides information about the related case or account.
3. Update the fields on the escalation form as needed.
   For example, you can change the escalation severity, which may trigger a different SLA, and update the escalation trend. You can also add users to the watch list and add comments about the progress of the escalation. For more information about these fields, see Case and account escalation form.
4. Click **Update**.

De-escalate a case or an account

The de-escalation requester can de-escalate cases or accounts when the cause of the escalation is resolved.

Before you begin

Role required:

- sn_customerservice.deescalation_requester or sn_crm_escalation_admin to escalate a case.
- sn_customerservice.deescalation_requester or sn_crm_escalation_admin or sn_crm_account_data_manager to escalate an account.

sn_customerservice.deescalation_requester

About this task

Procedure

1. Navigate to the desired escalation record.
2. Select **De-escalate** in the form header.
   This opens the De-escalate Case pop-up window.
3. Enter the necessary information in the **De-escalation Justification** field.

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4. Select **De-escalate** on the window.
   The state of the escalation record changes to **Closed**.

Major issue management overview

Major issue management enables customer communication for issues that impact a wider audience. Use this application to proactively identify impacted customers, provide information to these customers, and manage the resolution process.

This application enables you to efficiently manage the communication and resolution process for issues that impact multiple customers. With major issue management, you can identify impacted customers who have not yet reported an issue and proactively create cases for these customers.

Major issue management introduces the concept of a major case which contains the details about a particular issue. Child cases can easily be created for a major case, with one child case created for each customer affected by the issue. These child cases contain the customer-specific information.

Identify affected customers by creating a recipients list of accounts, consumers, or business organizations and attaching it to the major case. Create this list using the Targeted Communications application. Build a recipients list by identifying dynamic conditions, running a script, or importing customer information into a template. Once attached to a major case, use the recipients list to create a child case for each customer included in the list.

Install the Major issue management application from the ServiceNow® Store.

A major case is created in one of two ways:

- A customer service manager can create a major case.
- A customer service manager or major issue manager can promote a major case candidate.

Major case candidates are created either by promoting an existing customer service case (for customer reported issues) or by creating a candidate case directly (for non-customer reported issues). Candidate cases require approval before being promoted to major cases.

Major issue management also provides properties that enable automatic synchronization from a major case to the associated child cases. Use these properties to enable synchronization and to identify the synchronized fields.

Major issue management supports creating major cases that match the case type of the candidate case. When the `enable_case_type_for_major_case` property is set to true, the system uses the `sys_class_name` of the candidate case to determine the case type of the resulting major case and its child cases, rather than defaulting to the base Case table.

Major Issue Management menu can be used in the ServiceNow AI Platform interface and in the Agent Workspace interface.

Identifying issues and creating major cases

Customer service agents, managers, and major issue managers can use the following process to identify potential issues, create major cases, and identify impacted customers.

1. Create a major case candidate or flag an existing customer service case as a major case candidate.
2. Review the major case candidate and either approve it as a major case or reject it.
   - If approved, the candidate case becomes a child case of the major case.
   - If rejected, the candidate case returns to a normal case.

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3. Associate other cases reported for the same issue as child cases of the major case.
4. Identify other customers impacted by the issue by creating a recipients list and attaching it to the major case.
5. Create child cases for the customers included in the recipients list.
6. Manage the issue to resolution using the major case.
   - Update the major case as needed, which automatically updates the child cases.
   - Close the major case when the issue is resolved. Closing the major case automatically closes all the child cases.

Major, candidate, and child cases

Major issue management uses major case candidates to identify potential issues that impact multiple customers. Managers approve candidate cases for promotion to major cases, which you use to manage issue resolution. The system creates child cases for impacted customers and links them to the corresponding major case.

Major cases

A major case contains information about a specific issue that affects multiple customers. The major case itself is not linked to specific accounts, contacts, consumers, or business organizations. Instead, customer-specific information is stored in the child cases that are linked to the major case.

The recipients list associated with the major case identifies customers impacted by the issue. Select a list in the **Affected Customers** field in the Major Case Information form section of the Major Case form. After adding the list, you can automatically create child cases for all customers on the list. These cases are added to the **Child Cases** related list on the Major Case form.

With synchronization enabled, updates to the parent major case are automatically synchronized to the associated child cases. When the major case is closed, the system also closes associated child cases in the following states: New, Open, Awaiting Customer Info.

When the `enable_case_type_for_major_case` property is set to `true`, the system uses the `sys_class_name` of the candidate case to determine the case type of the resulting major case and its child cases, rather than defaulting to the base Case table.

To identify major cases in the list view, check the value in the **Major case state** field.

- Major cases have a state of Accepted.
- Major case candidates have a state of either Proposed or Rejected.
- Regular cases have a blank value.

In the form view, major cases and major case candidates display the Major Case Information form section.

Note: Related links on a major case form don't synchronize to associated child cases.

Major case candidates

A customer service agent uses a major case candidate (also called a candidate case) to flag an issue that might affect multiple customers. An agent can create a major case candidate in two ways:

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- By promoting an existing customer service case to a major case candidate.
- By creating a new major case candidate directly.

A customer service manager or major case manager must approve a major case candidate before it can be promoted to a major case.

- If a candidate case was promoted from an existing case, the system creates a new major case and the candidate case becomes a child case of that major case.
- If a new candidate case is created directly, that case becomes the major case.

If a major case candidate is rejected, the system reverts it to a regular case.

Child cases

Child cases are linked to a major case. The system creates one child case for each account (B2B), consumer (B2C), or business organizations that is affected by the major case issue. Child cases are created from the recipients list on the major case, and a major issue manager can also add them manually.

When the system creates child cases, it copies the short description from the major case to each child case. The system does not create duplicate child cases. If a child case already exists for an account, consumer, or or business organizations the system does not create another one.

When you create child cases, you can enter text in a pop-up window. This text is added to the **Additional comments** field on the child case form. These comments are added only to the newly created child cases. The major case and any existing child cases are not updated.

The primary contact for an account is automatically added to the child case as a contact and is included on the child case watchlist.

Suggested child cases

When a major case is in the **Proposed** state, the AI detection workflow populates the **Suggested child cases** related list with cases that have been identified as potential members of the major case group.

A major issue manager can review the suggested child cases and use the **Add to major case** action on the **Suggested child cases** related list to add the cases as child cases of that major case. This action is available only when the major case state is **Accepted** and the case is in a non-terminal state.

When a suggested child case is added to the major case, it is removed from the **Suggested child cases** list and added to the **Child Cases** related list.

When a major case moves to the **Accepted** state, all of the suggested child cases become child cases and are moved to the **Child Cases** related list.

Synchronization between major cases and associated child cases

The system administrator can set system properties to enable or disable synchronization between the major case and child cases, and to specify which fields to synchronize. Synchronization is one-directional: it occurs from the major case to the child cases. If a child case is in Resolved, Closed, or Canceled state, synchronization does not occur.

A major case and its child cases maintain synchronization on fields that are identified by the **sn_customerservice.case_fields_to_sync** property. This property specifies which fields are synchronized from the major case to the child cases. By default, these fields include:

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- Priority
- State
- Comments
- Work notes
- Close notes
- Resolution code

If the **State** field is synchronized from the major case to the child cases, the **Close notes** and **Resolution code** fields must also be synchronized.

Note: Child cases added to a major case manually can be added at any time. Newly added child cases do not receive synchronization retroactively.

When synchronization is enabled, the system displays a pop-up window when you save changes to a major case. Verify the update by clicking **OK**.

Note: In the base system, parent-child case synchronization is available only for the Case table (`sn_customerservice_case`). You must configure this feature for tables that extend the Case table.

Recipients lists

Use recipients lists that contain account, consumer, or business organizations information to create the child cases for a major case.

Major issue managers and customer service managers can select the desired list in the **Affected Customers** field on the Major Case form. Selecting **Create Child Cases** then creates a child case for each account, consumer, or business organizations in the recipients list.

Managers can change the recipients list before child cases are created. After child cases are created, the **Affected Customers** field becomes read only.

Creating recipients lists

Recipients lists are created using the Targeted Communications application. With this application, managers can select the type of list to create and the method used to create the list: by uploading files, selecting dynamic conditions, or using scripts.

The Targeted Communications application creates several types of recipients lists, including accounts, contacts, consumers, business organizations and internal users. The recipients list for a major case must be of type accounts or consumers. Recipients lists are limited to one specific type and can't contain mixed types, for example accounts and consumers.

Note: The Major Issue Management plugin is dependent on the Targeted Communications plugin. If Targeted Communications is active, recipients lists can be created for internal users. If Targeted Communications and Customer Service Management are both active, recipients lists can also be created for accounts, contacts, consumers and business organizations.

Manually editing a recipients list

Major issue managers and customer service managers can manually add or remove accounts or consumers from a recipients list by navigating to the Recipients List form, selecting **Edit** in the **Recipients** related list, and then using the arrows to add or remove records.

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The **Recipients** related list includes the **Dynamically Added** column which displays either True or False, depending on how a record was added:

- True for records that are dynamically generated, either by using the condition builder or by running a script.
- False for records that are added manually, either by using the **Edit** button on the **Recipients** related list or by file upload.

The **Active Communication** column is set to True by default for both dynamically and manually added records. This field indicates whether the recipient requires active communication.

Refreshing a recipients list

Refresh a recipients list by selecting **Refresh Recipient List** on the Recipients List form. For major issue management, the following guidelines apply to refreshing a recipients list:

- Refreshing a recipients list doesn't impact manually created records.
- If you remove a manually created record from a recipients list, it doesn't reappear when the list is refreshed unless it meets the dynamic conditions used to filter the list.
- If you remove a dynamically generated record from a recipients list, it may reappear when the list is refreshed if it meets the dynamic conditions used to filter the list.
- If the **Active Communication** field is set to false for a record, this setting doesn't change when a recipients list is refreshed.
- If created using the Upload File method, you don't need to refresh the recipients list.

Related topics

Create a recipients list

Propose a case as a major case candidate

A customer service agent role can propose an existing customer service case as a major case candidate.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

Cases in these states can be proposed as a major case candidate:

- New
- Open
- Awaiting Info

Cases that are Resolved, Closed, or Canceled can't be proposed as a major case candidate.

When proposing a case as a major case candidate, agents can specify the reason or justification for the case in the Propose Major Case pop-up window. Information provided in the **Work notes** and **Business Impact** fields are added to the Case form.

The major issue manager role receives a notification email when a case is proposed as a major case candidate. These users can select the link in the notification email to open the major case candidate in the platform interface.

Note: You can also propose a case as a major case on Agent Workspace.

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Procedure

1. Navigate to the desired customer service case.
2. Select **Propose Major Case** in the Additional Actions menu on the Case form.
3. In the Propose Major Case pop-up window, enter a reason for the proposal in the **Work notes** field.
   If desired, enter the business impact of the selected case in the **Business Impact** field.
   This information is added in the Case form in the **Work notes** field and the **Business Impact** field in the Major Case Information section.
4. Select **Propose**.
   An entry is added to the **Work notes** on the Case form that the case was proposed as a major case candidate. The information entered in the Propose Major Case pop-up window is also added to the Case form.

Create a major case candidate

Users with the customer service agent role can create a major case candidate.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

Users with the major issue manager role receive a notification email when a major case candidate is created. These users can click the link in the notification email to open the major case candidate in the platform interface.

Note: All major case candidates are automatically created as proactive cases as they are created internally and on behalf of the customer. To leverage the full capabilities of Proactive Customer Service Operations, install the Proactive Operations Management (com.snc.proactive_cs_ops) plugin.

You can also create a major case candidate from Agent Workspace.

Procedure

1. Navigate to **All** > **Major Issue Management** > **Create Major Case Candidate**.
2. Enter a description in the **Short description** field.
3. In the Major Case Information form section, enter the relevant information in the **Business impact** and **Probable cause** fields.
4. Click **Submit**.

Approve or reject a major case candidate

Users with the major issue manager role can approve or reject a major case candidate.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

You can also approve or reject a major case candidate from Agent Workspace.

Procedure

1. Navigate to **All** > **Major Issue Management** > **Candidates**.
2. Select the desired candidate case.

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3. Select one of the following from the Case form context menu.

Option	Description
Approve Major Case Candidate	Approves the current major case candidate as a major case. Upon approval: ○ If the candidate case was proposed from an existing case, a major case is created and the candidate case becomes a child case of that major case. ○ If the candidate case was created direct ly, the candidate case becomes the major case.
Reject Major Case Candidate	Rejects the current major case candidate as a major case. If rejected, provide a reason for rejecting the case in the Rejection Reason pop-up window. This information is added to the **Work notes** on the Case form.

4. Click **Update**.

Create a major case

Users with the customer service manager role can create a major case.

Before you begin

Role required: sn_customerservice_manager

Procedure

1. Navigate to **All** > **Major Issue Management** > **Create Major Case**.
2. Fill in the fields on the Case form.
3. In the Major Case Information form section, fill in the **Business impact** and **Probable case** fields.
4. Click **Submit**.

What to do next

You can view all cases by navigating to **Customer Service** > **Cases** > **Proactive**.

Create child cases for a major case

Users with the customer service manager role can create a child case for each of the customers included in the major case recipients list.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager, sn_customerservice_manager

About this task

The **Create Child Cases** button on the Major Case form creates a child case for each account, consumer or business organizations in the recipients list selected in the **Affected Customers**

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field. If a child case for an account, consumer or business organization exists, the system doesn't create a duplicate child case.

Note: Use caution when selecting the recipients list for a major case. Selecting the wrong recipients list can have a serious impact by creating a large number of cases for incorrect accounts, consumers, or business organizations. Verify that you have selected the correct recipients list before selecting **Create Child Cases**.

You can also create child cases for a major case from Agent Workspace.

Once child cases have been created, you can't change the recipients list. Any additional recipients must be added manually. After manually adding recipients to the list, select **Create Child Cases** again to create child cases for these new recipients.

Creating child cases copies information from the major case to each of the child cases. The field values that are copied to the child cases are identified by the **sn_customerservice.case_fields_to_sync system** property.

Procedure

1. Open the desired major case.
2. In the Major Issue Management form section, select a recipients list in the **Affected Customers** field.
3. Select **Update**.
4. Select **Create Child Cases**.
5. In the Create Child Cases pop-up window, enter information about the major case.
   This information is added as additional comments to each of the newly created child cases. If child cases for this major case exist, these child cases aren't updated.
6. Select **Continue**.
   The child cases are created and added to the **Child Cases** related list.

Related topics

Recipients lists

Add an existing case as a child to a major case

A major issue manager can add an existing case as a child to an accepted major case, either by selecting from a list of cases or by adding a case from the **Suggested child cases** related list.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager, sn_customerservice_manager

About this task

There are two ways to add child cases to an accepted major case:

- **From the Child Cases related list**: Search for and select any existing case that is not already a major case.
- **From the Suggested child cases related list**: Add one or more cases that the AI detection workflow has identified as potential members of the major case group.

Procedure

Add a case from the Child Cases related list

1. Open the desired major case.
2. In the **Child Cases** related list, select **Add** to display the Add Child Cases pop-up window.

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3. The Add Child Cases pop-up window displays a list of customer service cases that are not major cases.
4. **Optional:** Use the filters to narrow the list of cases displayed in the window.
5. Select the cases to add to the major case by enabling the check box for each case.
6. Select **Submit**.
   The system evaluates the selected cases and adds none, some, or all cases to the **Child Cases** related list. A message on the major case form informs you of the results by displaying one of the following:
   - No selected cases were added as child cases.
   - (x) of (y) selected cases were added as child cases.
   - All (y) selected cases were added as child cases.

   A work note is added to the **Activities** field for each child case added to the major case.

Add a case from the Suggested child cases related list: Use this method when the AI detection workflow has identified cases as potential members of the major case group. These cases appear in the **Suggested child cases** related list.

7. Open the accepted major case.

   Note: The **Add to major case** action is only available when the major case state is **Accepted** and the case is in a non-terminal state.

8. In the **Suggested child cases** related list, select the check box for one or more cases to add.
9. Select **Add to major case**.
   The selected cases are removed from the **Suggested child cases** list and added to the **Child Cases** related list. A confirmation message is displayed when the action succeeds.

Related topics

Recipients lists

Add an entitlement to a case

Add one or more entitlements to a customer service case record in CRM Workspace.

Before you begin

Role required: sn_esm_agent, sn_customerservice.consumer_agent

About this task

Agents can view the available entitlements on a customer service case and associate one or more entitlements to the case. Available entitlements are associated with the account, consumer, or contract selected on the case record.

Starting with the Zurich release, the `sn_customerservice.advanced_entitlements` system property determines if agents can associate one entitlement to a case or multiple entitlements.

- If set to true, the Case Entitlements related list is visible on the Case form and the **Entitlement** field is hidden. Agents can use this list to associate multiple entitlements to the case.
- If set to false, the **Entitlement** field is visible on the Case form and the Case Entitlements related list is hidden. Agents can use this field to associate one entitlement to the case.

For more information, see Properties installed with Customer Service Management.

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Procedure

1. Open a case record in CRM Workspace.
2. Add one or more entitlements to the case.
3. Select the Case Entitlements related list tab and then select **Add**.
   If the record page displays the Related Lists tab in the contextual side panel, expand the Case Entitlements list and then select **View all** to display the Case Entitlements list.
4. Select one or more entitlements from the Add case entitlements pop-up window.
   The Add entitlements pop-up window displays the entitlements associated with the account, consumer, product, and contract selected on the case record.
5. Select **Add** on the Add case entitlements pop-up window.

   The selected entitlements are added to the Case Entitlements list.
6. Select **Save** to save the changes to the case.

Add an entitlement to a case line

Add one or more entitlements to a case line in CRM Workspace.

Before you begin

Role required: sn_customerservice_agent

Procedure

1. Open a case line record in CRM Workspace.
2. Select the Case Line Entitlements tab.
3. Select **Add** on the Case Line Entitlements tab.
4. Select one or more entitlements from the Add entitlements pop-up window.
   The Add entitlements pop-up window displays the entitlements associated with the **Account** field on the case line record and the **Contract** field on the parent case record.
5. Select **Add** on the Add entitlements pop-up window.

   The selected entitlements are added to the Case Line Entitlements tab.

Close a customer service case

Close a case at any time, except when it is in the **Resolved** state.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or admin

About this task

After an agent proposes a solution for a case, the state changes to **Resolved** and the customer can either choose to accept or reject the solution. If accepted, the case is closed. If rejected, the state reverts to **Open**.

An agent or agent manager can close a case at any time, except when it is in the **Resolved** state, whereas only a customer can accept or reject the proposed solution. When an agent or agent manager closes a case, details must be included in the **Resolution notes** field.

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Procedure

1. Open a customer service case in CRM Workspace.
2. Select the **Details** tab.
3. In the Closure Information section, fill in the following fields.
   a. Select a code in the **Resolution code** field that indicates the resolution state of the case.
   b. Enter any information related to the closure in the **Resolution notes** field.
4. Select **Close Case**.

Customer service satisfaction surveys

Customers can complete a satisfaction survey when they accept a case solution or close a case from the Customer Service Portal.

When a customer accepts a proposed solution for a case by clicking **Accept Solution** on the case record or closes a case by clicking **Close Case**, they can access a satisfaction survey in the Customer Service Portal. Customers have the option of completing or skipping the survey.

If a customer is using the email communication channel, the system sends an email with a link to a customer satisfaction survey when an agent closes a case. The customer can click on this link to complete the survey.

Note: One survey can be generated per case. If a survey has already been generated for a case, a second survey cannot be generated even if a case is reopened and closed again.

The Customer Service application includes a default survey that you can customize as needed. To customize the default survey, navigate to **Survey** > **View Surveys** and select **Customer Service Satisfaction Survey** from the list of assessment metric types. To edit the default survey, open the survey and click the **Survey Designer** button.

You can also design your own survey using the survey designer tool. After designing a survey, be sure to select a condition for triggering the survey.

Related topics

Assessments and Surveys

Service Manager dashboard

Create a consumer case from a chat

If a consumer chat results in the need to open a case, create the case directly from the conversation.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

When you create a case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

Procedure

1. Navigate to **All** > **Collaborate** > **Connect Support**.
   The Connect workspace opens in a new tab.
2. Click the support tab of the Connect sidebar, indicated by a headset icon.

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The support tab displays **Queues** to which you belong. It also displays your open support conversations under **Cases**. When a consumer starts a support conversation or an agent transfers a conversation to a queue, any agent who belongs to the associated queue has the option to accept the conversation. An agent can also request to transfer a conversation directly to you.

3. Under **Cases**, open a consumer conversation.
4. At the bottom of the conversation, click the menu icon to open the Connect actions menu.
5. In the Connect actions menu, select Create Case.
   The system opens a new Case form and fills in some of the fields based on the conversation details. (For a case created from a consumer chat, the **Consumer** field is filled in and the **Short description** field displays the initial chat request from the consumer.)
6. Complete the form as necessary and click **Submit**.
   The system shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table.

Create a consumer case from an anonymous chat

If an anonymous chat results in the need to create a consumer case, create the case directly from the conversation.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

When you create a case from a support conversation, the system copies the conversation history to the case activity stream as comments and work notes. Future messages are tracked in the case as well.

Procedure

1. Respond to an anonymous chat request.
2. Chat with the user to determine the issue.
3. At the bottom of the conversation, click the menu icon to open the Connect actions menu.
4. In the Connect actions menu, select **Create Case for Guest**.
   The system opens a new Case form and fills in some of the fields based on the conversation details. For a case created from a guest user chat, the **Short description** field displays the initial chat request from the user.
5. Complete the form as necessary and click **Submit**.
   The system automatically shares the record in the conversation, copies the conversation to the record activity stream, and references the record on the Chat Queue Entry [chat_queue_entry] table.

Create a consumer record

Consumer service agents and managers can create consumer records from the Customer Service Management application.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager

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- sn_crm_foundation_admin
- sn_customerservice.consumer_agent
- sn_customerservice_manager
- admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select **New**.
3. Fill in the fields on the Consumer form as necessary.
4. Fill in the fields on the Primary Address tab.
   A consumer can have multiple addresses but only one primary address. The primary address is stored in the Primary Address tab on the Consumer form and in the **Addresses** related list.
5. If desired, fill in any of the fields on the Preferences tab.
6. Select **Submit**.
   The record is added to the Consumers table (csm_consumer). The primary address is added to the **Addresses** related list and the **Primary** field is set to **true**.

Related topics

Create additional consumer addresses

Create a consumer record from an anonymous chat

If an anonymous chat results in the need to create a consumer record, create the record directly from the conversation.

Before you begin

Role required: sn_customerservice.consumer_agent, sn_customerservice_manager, or admin

About this task

Procedure

1. Respond to an anonymous chat request.
2. Chat with the user to determine the issue.
3. At the bottom of the conversation, click the menu icon to open the Connect actions menu.
4. In the Connect actions menu, select **Create Consumer and Case for Guest**.

   The system opens a Consumer form and fills in some of the fields based on conversation details. For a consumer record created from a guest user chat, the **First name**, **Last name**, and **Email** fields display information from the initial chat request.

   Selecting this option creates a consumer record using the information provided on the record producer and then associates the case with the newly created consumer. The Case form is also populated with the information provided on the record producer.

5. Complete the form as necessary and click **Submit**.

Special handling notes

The Special Handling Notes application enables you to create notes that bring important information about individual records, such as a case or account record, to the user's attention.

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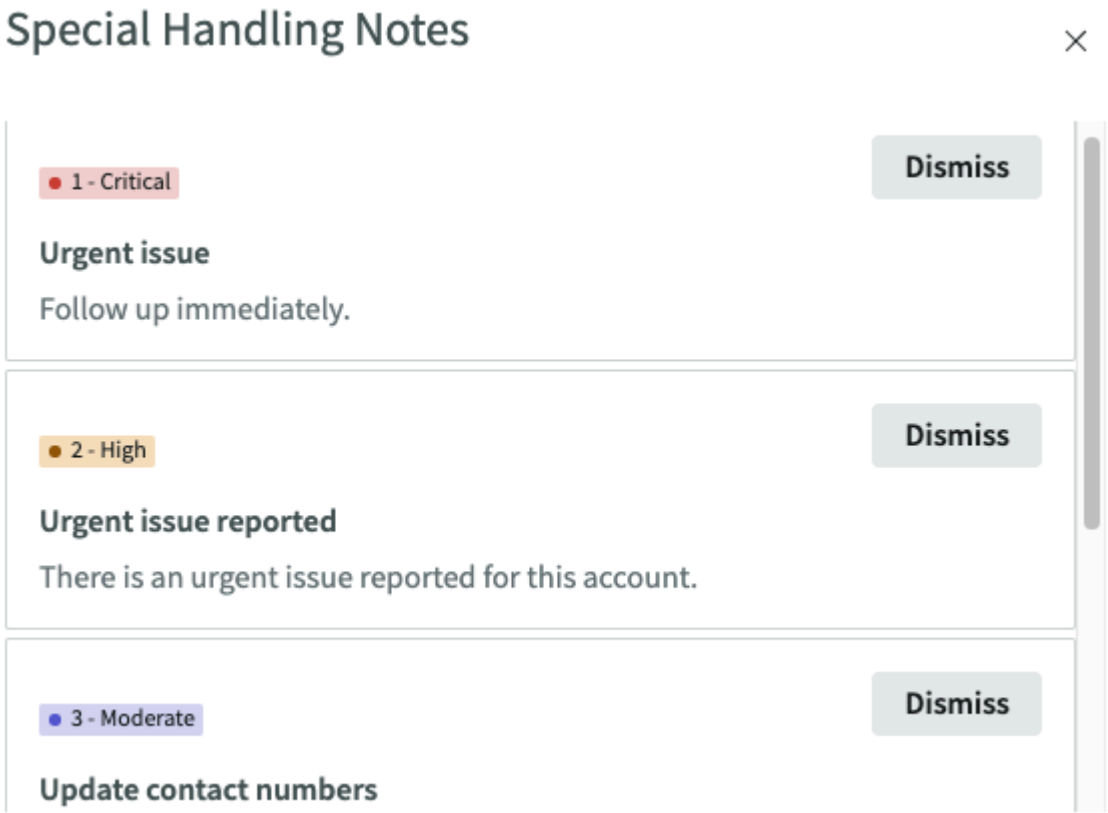
Special handling notes in CSM Configurable Workspace



You can create special handling notes for specific records or for a set of records that meet one or more conditions. You can also configure this application to display any special handling notes from related records, such as the account or the product associated with a customer service case.

Important: Use special handling notes for special circumstances and not for the general case processing workflow. It is not recommended to have more than 10k special handling notes on an instance. In addition, avoid complex conditions and use dot walking sparingly when creating special handling notes. Having a large number of notes with complex conditions can affect the load time.

Configuring special handling notes

Users with the sn_shn.admin role can configure the desired entity tables, such as the Case table, to use special handling notes. Special handling notes can be configured to display in the following ways:

- In a pop-up window that appears when a user accesses a form.
- In an embedded list or a related list on a record form.

For more information, see the following configuration topics:

- Configure special handling notes
- Configure an entity table to use special handling notes
- Configure a form to show special handling notes

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Creating, updating, and deleting special handling notes

Users with the sn_shn.admin role can create, update, and delete special handling notes. Users with the sn_shn.editor role can view and update notes and users with the sn_shn.user role can view notes. For more information about creating special handling notes, see the following topics:

- Create a special handling note
- Components installed with Special Handling Notes

Special handling notes display important information to the user. In addition to a message, a special handling note also has a status, an assigned priority, and an expiration date.

The status of a note can be one of the following:

Special handling note states

Status	Definition
Active	The note is active. Active notes appear on the Special Handling Notes list or pop-up window. Active notes remain on the list until they are set to **Inactive** or **Expired**. Active notes remain on the pop-up window until dismissed or until they are set to **Inactive** or **Expired**.
Inactive	The note is no longer active. Users with the sn_shn.admin or sn_shn.editor role can set a note to **Inactive** if the information in the note is no longer useful. When a note is set to **Inactive**, it is removed from the Special Handling Notes list or pop-up window. Inactive notes can be viewed by navigating to **Special Handling Notes** > **Special Handling Notes**.
Expired	The note has reached it's expiration date or it has been expired manually. If a note is expired, the form becomes read-only for all user roles other than the system administrator. A note is expired automatically by a scheduled job when it reaches it's expiration date. The scheduled job also sets any inactive notes to expired if the inactive notes have reached their expiration date.

A note can be assigned one of the following priorities. Each priority has an associated color, which is displayed as a colored bar in the pop-up window and as a colored circle in the **Priority**

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field in a list. The Core UI and the CRM Workspace interface use different colors to represent priority.

Special handling note priorities

Priority	Core UI	CRM Workspace
1 - Critical	Red	Red
2 - High	Orange	Orange
3 - Moderate	Green	Purple
4 - Low	Blue	Gray

When creating a special handling note, you can make it effective right away or you can select a date when it becomes effective. You can also select an expiration date.

Special handling notes pop-up window

Special handling notes can be displayed on a form in a pop-up window. Users with the sn_shn.admin role can configure a form to display the Special Handling Notes pop-up window. This window appears when you access a record that has one or more active notes. The pop-up window displays the following information for each note:

- Message
- Priority

To dismiss a note, click **Dismiss**. Once you dismiss a note, it no longer appears in the pop-up window. To close the Special Handling Notes pop-up window, click **X**.

Special handling notes list

Special handling notes can be displayed on a form in an embedded or related list. Users with the sn_shn.admin role can configure a form to display the Special Handling Notes list. This list appears on a form when there are one or more active notes for a record. The Special Handling Notes list displays the following information for a note:

- Message
- Expiration date
- Priority
- Table

Resurfacing special handling notes

Special handling notes are typically displayed in a pop-up window when a record is opened. Agents can view the special handling notes, dismiss individual notes, and close the window. If an agent closes the window, they can open it again and display the special handling notes without closing and reopening the record tab in CRM Workspace.

To open the special handling notes pop-up window after it has been closed, select **Special handling notes** from the More actions menu (···) on the action bar. If no special handling notes are available, the system displays an informational message: “No special handling notes are available.”

The **Special handling notes** action that agents can use to reopen the special handling notes window is currently available on the following record pages in CSM Configurable Workspace:

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- Front-line case page
- CSM default record page

In addition to these pages, the action is also available on records from the following tables:

- Account
- Asset
- Contact
- Incident
- Product model
- Work order task

Expiring special handling notes

The **Deactivate Special Handling Notes** scheduled job, which runs daily at midnight, checks the dates in the **Effective on** and **Expires on** fields for each note.

- If a special handling note has reached its **Effective on** date, the scheduled job sets the status of the note to **Active**.
- If a special handling note has reached its **Expires on** date, the scheduled job sets the status of the note to **Expired**.

Special handling notes plugin

Activating the Case Management Core plugin (com.sn_customerservice) provides the CRM Workspace functionality, including the CRM Workspace Special Handling Notes (com.snc.uib.special_handling_notes).

Domain separation for Special Handling Notes

The Special Handling Notes application supports domain separation as a process-separated table.

When inserting or updating a special handling note, the picker domain scope takes precedence by design with the Overrides [sys_overrides] field on process-separated tables. For more information, see Process administration.

Related topics

Configure special handling notes

Manage special handling notes

Create additional consumer addresses

Consumers can have multiple addresses, including one primary address.

Before you begin

Role required: One of the following roles:

- sn_crm_consumer_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_foundation_data_manager
- sn_crm_foundation_admin

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- sn_customerservice.consumer_agent
- sn_customerservice_manager
- admin

About this task

The primary address is stored in the Primary Address tab of the consumer form within the **Addresses** related list. When you fill in the fields in the Primary Address tab and select **Submit**, this information is added to the **Addresses** related list as the primary address, with the **Primary** field set to true. Any changes made to the **Primary Address** fields are also updated in the related list. A consumer can have only one primary address.

Other addresses, such as billing or shipping addresses, can be created and stored in the **Addresses** related list. For these other addresses, the **Primary** field is set to **false**.

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Consumers**.
2. Select the number of the desired consumer.
3. In the **Addresses** related list, select **New**.
4. Fill in the fields on the Location form.
5. To denote this address as the primary address for the consumer, enable the **Primary** check box.
   A consumer can have multiple addresses but only one primary address.
6. Select **Submit**.

Respond to a case using an email quick message

Use predefined quick email messages to quickly draft replies to customers. Agents can select predefined quick messages to add content into the message body of emails.

Before you begin

Role required: sn_customerservice_agent

About this task

Business managers and admins can set up email quick messages and predefine the content for replying to cases. For example, you can predefine personal greetings, disclaimers, different types of additional information, and signatures.

You can incorporate icons, business logos, pictures, HTML layout, and rich text format. You can also configure quick messages so that only a certain user or a group can view them.

For more information, see the following topics:

- Composing emails with quick messages
- Define a quick message

Procedure

1. Open a customer service case.
2. Select the More Actions icon ( ) and then select **Email**.
3. Select the Quick Messages drop-down menu in the Compose Email header and select a predefined message.
   The content of the quick message is inserted in the message body at the cursor location.

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4. **Optional:** Select additional quick messages.
5. Select **Send**.

Related topics

Define a quick message

Composing emails with quick messages

Initiate a conference call from a case

As part of resolving a customer service case, you can initiate a conference call between involved users.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, admin

About this task

Customer service agents can initiate a conference call from a case and add participants, including on-call members of shift groups.

Note:

Notify must be set up before you can use Notify on task. Ensure there are Notify phone numbers (E.164 or short code) in number groups with phone call workflows. Also ensure the property **glide.notify.task.phone_number** is set to one of these Notify phone numbers.

Procedure

1. Open the desired case.
2. Click the **Start Conference Call** related link.
3. Select one or more **Recipients** to participate in the conference call.
   You can add individual participants, groups, or individual phone numbers.

Related topics

Start a conference call

Start a conference call from a task

Use the Activity Stream

Enhancements to Activity stream help reduce cluttering the Activity Stream and the agent effort to understand the case context.

Before you begin

Role required: admin

About this task

Enhancements in the Activity Stream include the following:

- Filter by post type
- Sort messages and events
- Improved email representation

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Procedure

1. Open a customer service case.
   You would see the Activity Stream with the filter options.
2. Click the Filter icon ( ).
   The Filter sets are displayed. The conversation filter sets items such as emails, comments, and work notes.
3. Select the **Post types** filters from the drop-down list.
   For example, if you select **Work notes**, only the notes are displayed in the Activity Stream.

   Note: Selecting only **Field changes** displays the fields in the Activity Stream.

4. Select the **Field changes** drop-down list to filter the fields.
   For example, if you select **State**, only the state changes are visible.
5. Click the **Flagged** tab to see only the flagged messages.

   Flagged messages are visible to everyone who has access to the case.

6. Click the Sort icon ( ) to sort the events and messages based on the timeline.
7. Click the More Options icon ( ) and select **Expand all posts** to view the post details or select **Collapse all posts** to go back to the previous state.
8. Click **Show more** in an email to view the latest email response in an expanded form.
9. Click **Show full conversation** to view the whole email thread.

Related topics

Configure Activity stream

Resolve cases with knowledge and community content

Enable agents to resolve a case more quickly by searching for information from the knowledge base and community and, if helpful, associating it to the case.

Before you begin

Role required: sn_customerservice_agent

About this task

The Case form displays contextual search results based on text entered in the **Short Description** field. These search results provide targeted knowledge articles, pinned articles, and community content to customer service agents.

Customer service agents can search for information that is related to a case when opening a case or in a case that is already open. If the search results in any related content, the agent can preview the content. If the information is relevant, the agent can mark it as helpful. Knowledge articles can be also attached to the case.

By default, search results include knowledge articles, pinned articles, and solved community questions and blogs. Depending on the configuration, search results can also include other types of information, such as open and resolved cases and problems. With the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml), you can also view similar cases and similar knowledge articles.

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Customer service case managers can use the Demand Insights for Cases dashboard to identify which cases have no or insufficient knowledge coverage. For more information, see Demand Insights for Cases dashboard.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases**.
2. Perform one of the following actions.
   - Open a new case and start typing in the **Short description** field.
   - Open an existing case and click **Related Search Results**.
   Any matching search results are displayed in the **Related Search Results** section. The content displayed depends on the permissions assigned to the agent in Knowledge and Communities.
3. Click one of the results to open the content in a pop-up window.
4. **Optional:** Perform any of the following steps.

To	Do this
Attach a knowledge article to the case	**a.** Click **Attach** next to the knowledge article you want to attach to the case. **b.** If you opened the knowledge article, click **Attach to Case** in the pop-up window. The knowledge article is displayed in **Activities** as a work note and is visible only to customer service agents. A link to the article is also entered in the **Additional comments** field. **c.** To make the article visible to customers, click **Post**. **Note:** You cannot attach Communities content to the Case form.
Mark the content as helpful for resolving the associated case	Click **This helped** in the pop-up window.
Scroll to previous or next result	Use the arrow keys to scroll up to the previous or down to the next result.

5. Perform one of the following actions.
   - If you opened a case, click **Submit**.
   - If you updated an existing case, click **Update**.

Manage skills for a customer service case

Add or remove optional and mandatory skills for a customer service case.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Agents can also change a skill between mandatory and optional.

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Procedure

1. Open the desired case.
2. Click the **Task Skills** related list.
3. To create a new skill:
   a. Click **New**.
   b. Select a skill in the **Skill** field.
   c. If mandatory, click the **Mandatory** check box.
   d. Click **Save**.
4. To switch the skill type:
   a. Click the desired skill.
   b. Enable or disable the **Mandatory** check box.
   c. Click **Save**.

Using CRM Workspace in Customer Service Management

Use CRM Workspace to interact with customers, create and work on cases, and resolve questions and issues.

Customer service agents can complete most tasks in CRM Workspace, while other tasks only apply to the platform interface. This information is noted at the top of each task.

The tables below describe some of the basic tasks that agents can perform in CRM Workspace as well as additional features that are available for use.

For additional task information, see Manage cases.

Agent tasks

Task	Description	Details
Use Knowledge to assist with cases	Search for knowledge articles and attach them to cases or open articles in sub-tabs for easier reading. Report a knowledge gap if you can't find relevant articles and, if permission is enabled, create articles directly from cases.	Search for knowledge articles Open a knowledge article Report a knowledge gap Create a knowledge article
Respond to community discussions	If a case is created from a community discussion, you can respond to the discussion from the case.	Respond to a community thread from a case
Use response templates	Quickly respond to customers using different types of predefined information.	Use response templates to add information to cases and case tasks
Manage email tasks	Preview emails and compose and send responses from cases.	Compose an email from a case

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Agent tasks (continued)

Task	Description	Details
		Compose an email from the ribbon component Send an email response from a case activity stream Preview an email from the Emails related list

Additional features

Feature	Description	Details
Create a specific type of case	Create a case for a specific type of customer issue.	Create a customer service case of a specific type
Look up a customer	Quickly look up contacts or consumers using information such as the name, phone number, or record number.	Look up and verify a contact or consumer
Use Customer Central	Look up customer information and recent activity to find out more about the customer you are assisting.	Use Customer Central
View product data	View details about customer instances, products, and components.	View install base information View sold product information
Use playbooks	Use the step-by-step guidance provided by playbooks to complete tasks and resolve cases.	Interact with playbooks
Use guided decisions	A guided decision prompts you to answer questions and provide inputs and then offers recommendations on the steps needed to resolve a case.	Use Guided Decisions in playbooks to resolve cases Use Guided Decisions in recommended actions to resolve cases
Use recommended actions	A recommended action is a suggested helpful action for resolving a case. A recommendation can be a guidance, guided decision, or a suggested value for a case field.	Use Recommended Actions to resolve cases
Use trending case topics	Use trending case topics to identify cases with similar issues.	View trending case topics

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Additional features (continued)

Feature	Description	Details
		Add trending case topics to existing major cases Create major cases for trending case topics
Use estimated time to resolve a case (ETTR)	Use machine learning to predict the estimated time to resolve a case based on case attributes such as the short description, category, priority, and assignment group.	Estimated time to resolve a case Time to resolve ribbon component
Call back a customer	Call a customer back either immediately or at the date and time requested by the customer.	Address a callback request from a customer

Open CSM Configurable Workspace

Open CRM Workspace so that you can work on customer service cases.

Before you begin

Role required: sn_customerservice_agent

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces**.
2. Select **CSM Configurable Workspace**.

   The workspace opens in a new browser tab.

Look up and verify a contact or consumer

An agent can look up contact or consumer information from a saved interaction record, review and confirm the information, and then populate the information on the interaction record.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Agents can search for information such as name, phone number, email address, case number, or order number.

Procedure

1. Open CRM Workspace.
2. In the contextual side panel, select the Contact Verify icon or the Consumer Verify icon to access the lookup and verify feature.
3. In the **Verify Contact** or **Verify Consumer** fields, enter information such as the first few letters of a first or last name or the first few digits of a phone or case number.
   These fields use a type-ahead search feature that displays results in a list and narrows the results as more characters are entered. Multiple display fields in the search results help

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to differentiate contacts. When searching for a record number, the contact or consumer associated with the record is returned in the search results.

Note: Delete characters from the field to clear the search results.

4. Select the desired result from the list.
   This action displays information about the selected contact or consumer in a verification card. If the information is not correct, repeat steps 2 through 4.
5. Select **Verify** to confirm the selected contact or consumer.

   This action does the following:
   - Populates the **Account** and **Contact** or **Consumer** fields on the interaction record.
   - Enables the **Verified** check box.
6. **Optional:** You can look up and verify another contact or consumer by repeating steps 2 through 4 and entering different search information.
7. Select **Save** to save the interaction record and refresh the related lists.

Related topics

Lookup and verify

Create a contact or consumer using Lookup and verify

An agent can create a contact or consumer from the Lookup and verify feature in the Contextual side panel.

Before you begin

Role required: Any one of the:

- sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin, and sn_crm_account_data_manager roles to create a contact.
- sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin, or sn_crm_consumer_data_manager roles to create a consumer.

About this task

Agents can use the Lookup and verify feature to search for contacts and consumers. After verifying a user's information, agents can populate that information on the interaction record.

If an agent can't find a contact or consumer, they can create a record for that user from within the Lookup and verify feature.

Procedure

1. Open CRM Workspace.
2. From a saved interaction record, select one of the following icons in the Contextual side panel to access the Lookup and verify feature.
   - Verify Contact
   - Verify Consumer
3. Enter user information in one of the following fields: **Verify Contact** or **Verify Consumer**.
   This information can include the first few letters of a first or last name or the first few digits of a phone or case number.
4. If you can't locate the contact or consumer and choose to create a record, select **Create Contact** or **Create Consumer**.

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The system displays the Create Contact or Create Consumer form in the Contextual side panel.

If the **Account** field on the Interaction record is populated when you select **Create Contact**, the **Account** field on the Create contact form is populated with the same information.

5. Add information to the fields on the form and select **Create**.
   The system performs the following actions:
   - Saves the contact or consumer record.
   - Creates and displays the contact or consumer card.
   - Adds the information to the interaction record.

Related topics

Lookup and verify

Look up and verify a contact or consumer

View the install base in CRM Workspace

View a customer's install base in CRM Workspace to quickly identify the support they require as well as the opportunities for adoption and upsell.

Before you begin

Verify that the Customer Service Install Base Management plugin (com.snc.install_base) is activated.
Role required: sn_customerservice_agent

About this task

You can view information about a customer's purchased products and services, delivery details, and additional components that are available for the product models.

Procedure

1. Open CRM Workspace.
2. Select the account that you want to view the install base for.
3. Select the Install Base related list.
4. Scroll through the Sold Products tree view to view the details about the sold product and the list of install base items that belong to it.

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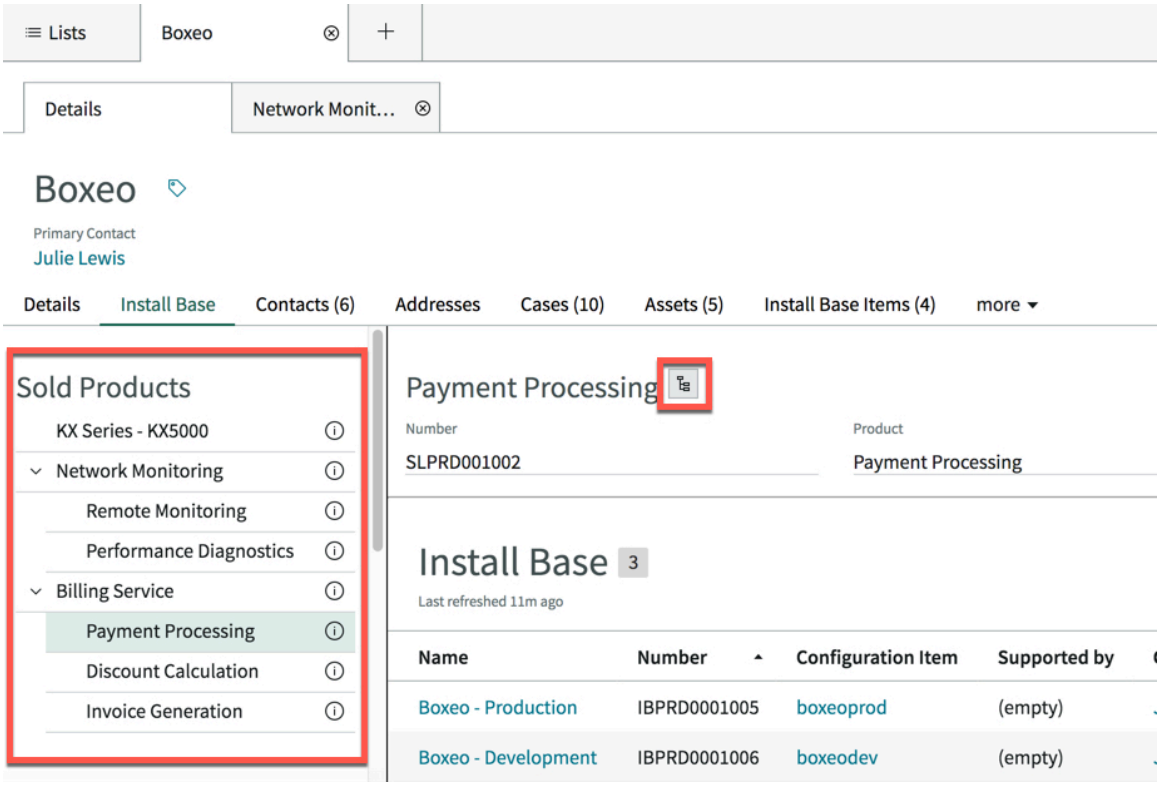
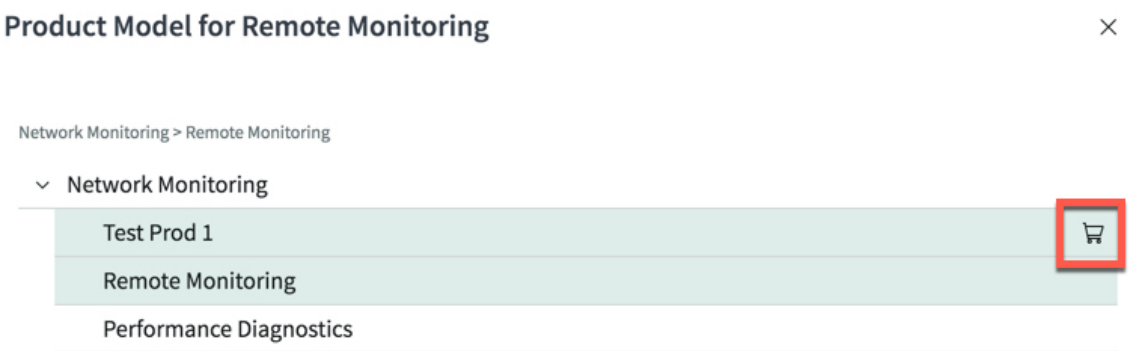


5. On the form header, select the Hierarchy icon to see the full product model that the sold product is part of.
   The product model hierarchy opens in a separate window. Unpurchased product components have a shopping cart icon next to them.



6. View the install base items and related lists in the configurable workspace by navigating to **Products** > **Install Base item**.
7. View the details of the install base item by opening an install base item.

> **Note:** You can also use the right navigation pane to view the install base items and related list.

View sold product information in CRM Workspace

Enable customer service agents or managers to view the sold products and the service offerings associated to the sold product for an account or consumer.

Before you begin

Role required: sn_customerservice_agent

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About this task

Customer service agents can view which service offerings are associated to the sold products affected by an issue. They can also see the service commitments and availability.

Procedure

1. Open CRM Workspace.
2. Open a customer service case.
3. Click **Sold Products** to view the sold product associated to the case and the service offering associated to it.
4. Click the service offering to view the service commitments associated to it.

Search for knowledge articles in CRM Workspace

Search for knowledge articles in Agent Assist, including similar knowledge articles.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Agent Assist displays contextual search results based on text entered in the **Short description** field on the Case form. These search results include knowledge articles and other types of information, such as open or resolved cases and community content. You can narrow the list of results by selecting a specific type of information to view.

Note: With the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml), you can also view Similar Knowledge Articles.

Procedure

1. Open CRM Workspace.
2. Open a customer service case.
3. Perform one of the following.
   - In the Agent Assist panel, select the search resource icon ( ) and select a search source.
     - `Knowledge Articles`
     - `Similar Knowledge Articles`
   - In the Recommended Actions - Search tab, search with a keyword and select the **Search source** as `Knowledge` to filter the knowledge articles.

     For more information on how to enable Recommended Actions - AI Search and disable Agent Assist, see Enable AI search in Recommended Actions.
4. Select a knowledge article.
5. Select **Attach**.
   Depending on your configuration, you can add a link or embed an article directly into the Additional comments (customer visible) portion of the activity stream.

Open a knowledge article in a sub-tab

Search for a knowledge article in Agent Assist or Recommended Actions - AI Search and then open the article in a sub-tab.

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Before you begin
Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

Procedure

1. Open CRM Workspace.
2. Open a customer service case.
3. Perform one of the following actions in the Contextual side panel:
   - In the Agent Assist tab, select an article from the default search or search for something specific using the search bar and then select an article.
   - In the Recommended Actions - Search tab, search for the desired article and select the Search source as **Knowledge** to filter the knowledge articles.

     For more information on how to enable Recommended Actions - AI Search and disable Agent Assist, see Enable AI search in Recommended Actions.
4. View the article in the Contextual side panel.
   After viewing the article, you can also perform the following actions:
   - Select **Attach** to attach the article to the case. Add any additional comments in the Attach Article pop-up window and then select **Attach Article**. The article is attached to the case and added to the Attached Knowledge related list.
   - Select **Flag** to flag the article. Add a comment in the Flag Article pop-up window and then select **Save**. This action generates a feedback task for the knowledge article.
   - Select the knowledge article link below the article title to open the article in a separate tab. You can also select the More Actions menu and then select **Full View**.
   - Select the More Actions menu and then select **Helpful** to mark the article as helpful.

Create a knowledge article from a case

Create knowledge articles from customer service cases to save case information and make it available to others in a knowledge base.

Before you begin
Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task
When you create or edit a knowledge article in CSM Configurable Workspace, you can access the editing capabilities available with the Knowledge Center article editor. Use the editing capabilities available with the article editor to format article content such as text, images, and media.

When creating a knowledge article, you can select a knowledge base and an article template and see a preview of the selected template. Then you can use the article editor in CRM Workspace to create the article.

> **Note:** The `sn_km_center.glide.knowman.ece.enable` system property enables the Knowledge Center article editor within CRM Workspace. This property is set to true by default for zBoot customers and can be enabled by upgrade customers.

Before creating knowledge articles, the system administrator needs to enable creation of articles from customer service cases.

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Procedure

1. Open a customer service case.
2. Select **Create** > **Create Knowledge**.
   The system displays an interceptor page.
3. Select a knowledge base.
   After selecting a knowledge base, the system displays a list of the active templates.
4. Select an article template.
5. View the template preview and then select **Next**.
   The system displays the Knowledge Center article editor.
6. Use the article editor to create your article.
   The article editor page includes three columns:
   - Article information fields
   - Article editor
   - Article building blocks and settings

   For more information about using the Knowledge Center article editor to create your article, see Generate and edit articles using the article editor.
7. Select **Save**.

Report a knowledge gap

If you cannot find relevant knowledge articles that could help resolve a case, you can report a knowledge gap.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_customerservice_manager, workspace_admin, admin

About this task

You can search for and attach knowledge articles to a customer service case. If you cannot find any relevant articles, you can report a knowledge gap. If you have permission, you can also create a knowledge article.

Customer service case managers can use the Demand Insights for Cases dashboard to identify which cases have no or insufficient knowledge coverage. For more information, see Demand Insights for Cases dashboard.

Procedure

1. Open CRM Workspace.
2. Open a customer service case.
3. **Optional:** Search for existing knowledge articles or create a knowledge article to help resolve a case.
4. Click the More UI Actions icon (···) and then click **Report Knowledge Gap**.
   In the platform interface, click the **Report Knowledge Gap** related link on the Case form and provide information in the resulting pop-up window.
   The system opens a new knowledge feedback task in a sub-tab. The short description from the case is copied to the **Description** field on the task.
5. **Optional:** Edit the knowledge feedback task description.
6. Click **Save**.
   The task is added to the **Knowledge Gaps** related list on the Case form.

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Respond to a community thread from a case

For cases that are created from a community discussion, customer service agents can view and respond to the discussion in a new browser tab.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, admin

About this task

Cases that have been created from a community discussion have the **Channel** field set to Community.

Procedure

1. Open CRM Workspace.
2. Open a case that was created from a community discussion.
3. Select the More UI Actions icon and then select **Show Community Thread**.
   This UI action is only available if the **Channel** is Community.
4. View the community discussion in a new browser window and respond as necessary.

Use response templates to add information to cases and case tasks

Customer service agents can copy content from response templates and add it to cases and case tasks.

Before you begin

Role required: sn_customerservice_agent with the sn_templated_snip.template_snippet_reader role

About this task

The contextual side panel in CRM Workspace gives you access to information that can help you resolve customer service cases. It includes a column of icons that you can click to access different types of information. Clicking the response templates icon shows reusable messages that you can copy and paste into cases and case tasks.

Procedure

1. Open CRM Workspace.
2. Open a customer service case or case task.
3. In the contextual sidebar, click the response templates icon ( ) to display a list of templates.
4. In the Response Templates side panel, search for a template.
5. Select a template and then click **Copy to clipboard**.
6. Paste the template text into the **Work notes** field or the **Additional comments** field.

Related topics

Response templates

Use Customer Central

Get a quick overview of key customer information and recent customer activity to help you find out more about the customer contacting support.

Before you begin

Role required: sn_customerservice_agent

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Role required if using the Walk-up Experience for business locations: sn_customerservice.svc_location_agent, sn_customerservice.svc_location_manager, or sn_customerservice.svc_location_consumer_agent.

About this task

Use customer central to get a quick insight into key customer information and recent activity from the customer, who is contacting support. You can filter by date or facet to access the information you require.

Note: Accounts require contact information to display account information in Customer Central.

In CRM Workspace, you can access Customer Central from within the Interaction, Contact, Account, or Consumer records.

Procedure

1. Open CRM Workspace.
2. On the Interaction, Contact, Account, or Consumer record, select Customer Information to view key information on the customer.
3. On the Interaction, Contact, Account, or Consumer record, select Customer History to view recent activity from the customer or chat summary between the agent and customer.
4. Create a case or close the record.

View trending case topics

Analyze the backlog of cases and identify clusters of cases that point to similar underlying issues.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager

About this task

View a list of clusters and cluster concepts.

- Cluster concepts list the top ten most recurring words that appeared in the short description of the cases.
- Cluster size indicates the number of cases in the cluster.
- Cluster quality gives a percentage value of how similar the cases are.

Procedure

1. Open CRM Workspace.
2. Navigate to **Lists** > **Trending Case Topics** > **Last 1 week**.

What to do next

Click a **Cluster Id** to view the Cluster Summary form details, Related Cases and Related Major Cases.

You can also create a major case for trending case topics.

Add trending case topics to existing major cases

Work through cases more efficiently and resolve similar cases at once by identifying any existing major cases that the backlog of cases can be linked to.

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Before you begin
Role required: sn_majorissue_mgt.major_issue_manager

Procedure

1. Open CRM Workspace.
2. Navigate to **Lists** > **Trending Case Topics** > **Last 1 week**.
3. Click a **Cluster Id**.
4. On the Related Major Cases related list, check if there are any existing related major cases.
5. On the Related Cases related list, select the cases you want to add as child cases in the existing major case.
6. Click **Edit**.
7. In the **Parent** field, copy the number of the major case to add the child cases to.
8. Click**Update**.

Create major cases for trending case topics

Work through cases more efficiently and resolve similar cases at once by creating major cases to add the backlog of cases to.

Before you begin
Role required: sn_majorissue_mgt.major_issue_manager

About this task
If you didn't find an existing major case to add the trending case topics to and you think the cluster qualifies as a major case, you can create a major case, as applicable.

Procedure

1. Open CRM Workspace.
2. Navigate to **Lists** > **Trending Case Topics** > **Last 1 week**.
3. Click a **Cluster Id**.
4. On the Related Major Cases related list, check if there are any existing related major cases.
5. If there are no related major cases, click **Create Major Case**.
   A major case is created.

   All related child cases are linked as child cases to the major case if the **Parent** field in the case is empty and the case is in **Open** state.

What to do next
To access the major case, click the link in the confirmation message that a major case has been created.

Manage email tasks

You can compose, reply to, and preview emails directly from cases in CRM Workspace. This capability helps you save time and effort instead of having to address and send a separate email message.

You can perform the following email tasks from cases in CRM Workspace:

- Compose an email from a case
- Compose an email from the ribbon component

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- Send an email response from a case activity stream
- Preview an email from the Emails related list

Compose an email from a case

As an agent, you can compose emails directly from cases within a ServiceNow instance. This capability helps you view and send emails to two different customers simultaneously which saves time and effort.

Before you begin

Role required: sn_customerservice_agent

About this task

You can compose large emails easily in a full screen view which opens up in a new tab.

Procedure

1. Open CRM Workspace.
2. Select and open the case for which you want to compose an email.
   The case opens in a new top-level tab.
3. Select the More Actions icon and select **Compose Email**.
   The New Email screen opens in full view in a new sub-tab below the Case tab. The **To** field is pre-filled with the customer's email id and the **Subject** field contains the original case number and issue.
4. Compose your email and select **Send**.

   Note: You can also select **Save** to save the email and send it later. These drafts are available in the **Draft Emails** related list. To access the draft in the email compose tab, select the More Actions icon and select **View Draft** to see the saved draft.

Related topics

Compose an email from the ribbon component

Compose an email from the ribbon component

As an agent you can compose emails directly from cases within CRM Workspace without having to use an external email client. This capability helps you view and send emails to two different customers simultaneously which saves time and effort instead of having to address and send a separate email message.

Before you begin

Role required: sn_customerservice_agent

About this task

You can compose large emails easily in a full screen view which opens up in a new tab.

Procedure

1. Open CRM Workspace.
2. Select and open the case for which you want to compose an email.
   The case opens up in a new tab.
3. In the ribbon component, click the contact's email address.
   The New Email screen opens in full screen in a new tab. The **To** field is pre-filled with the customer's email id and the **Subject** field contains the original case number and issue..

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4. Compose your email and click **Send**.

> **Note:** You can also click **Save** to save the email and send it later. These drafts are available in the **Draft Emails** related list.

Related topics

Compose an email from a case

Compose an email from an email template

As an agent, you can compose emails using email templates. These templates contain default values for fields that you can easily add to email messages in the Compose panel on case records.

Before you begin

Role required: sn_customerservice_agent

About this task

Default values in email templates can include the recipients (email addresses in the To, Cc, and Bcc fields), the sender, the subject of the email, and text to include in the message body. For more information, see Email templates feature.

Procedure

1. Open CRM Workspace.
2. Open a case.
3. Select the Email tab in the Compose panel.
4. Select the Email Templates tab in the contextual side panel.
   The system displays the available email templates.
5. Select the desired template.
   The selected template card expands to show the template details.
6. Select **Apply Template**.
   The system populates the values for the configured fields in the email. If these fields already contain values, applying the selected template overwrites these values.
7. **Optional:** Add text for the body of the email in the text field.
8. Select either **Save as draft** or **Send Email**.
   The system stores draft emails in the Draft Emails tab on the case record.

Send an email response from a case activity stream

Respond to cases using options within a customer email thread. You may not require using another email client which saves time and effort.

Before you begin

Role required: sn_customerservice_agent

About this task

You can read and respond to large emails easily in a full screen which opens up in a new tab. Responding to a customer's email from within a case using the reply, reply all, or forward options, includes the content from previous conversation thread. These options are available by default. An admin can disable these options. For more information, see Disable email responses from the case activity stream.

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Procedure

1. Open CRM Workspace.
2. Select and open the case from the activity stream for which you want to send or forward a response.
   The case opens up in a new tab.
3. Click **Reply** in the Activity Stream to write a response to the customer or click the icon and select **Reply All** to reply to all the customer email ids mentioned in the original email or select **Forward** to forward the email to any other email ids not mentioned earlier.
4. Based on the selection, the Reply Email, Reply All Emails, and Forward Email screens opens in full screen in a new tab.

   Note: You can click the icon to add attachments from the file system or delete attachments already associated with the existing case.

5. Compose your email and click **Send**.

Related topics

Activity formatter

Email properties

Preview an email from the Emails related list

Preview emails directly from within cases. With this capability, you can select case-related emails and read the details in full view.

Before you begin

Role required: sn_customerservice_agent

About this task

For information about adding or modifying actions on a form, see the following topics:

- Customizing your workspace with declarative actions
- Create a form action button
- Declarative actions glossary

Procedure

1. Open CRM Workspace.
2. Select and open a case.
   The case opens up in a new tab.
3. Select the **Emails** tab.
4. Select an email to preview from the Emails list.
   The email opens in a sub tab and displays the details.

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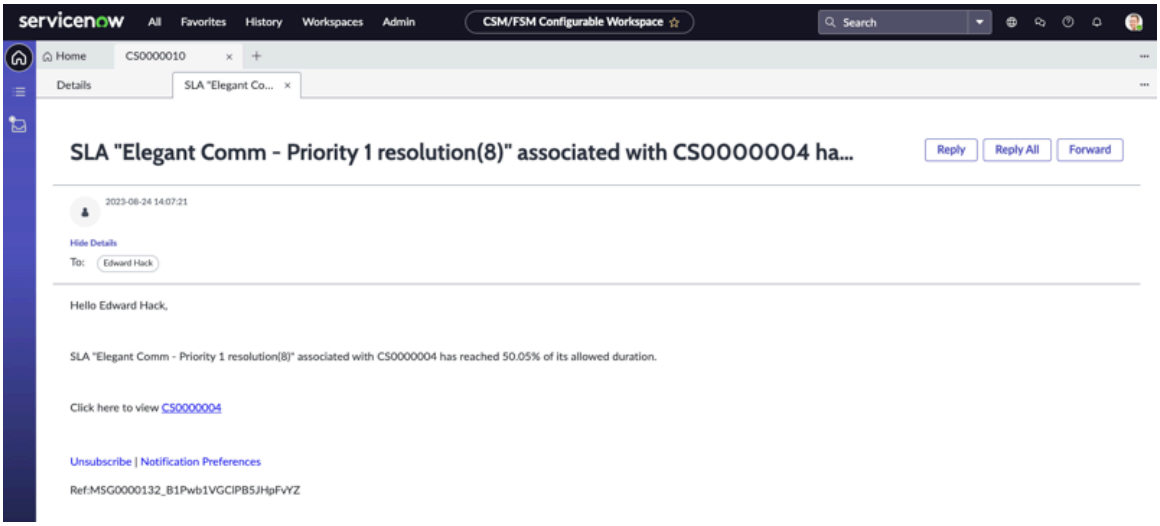

5. Select **Reply** or **Reply All** to reply to the message you're viewing or select **Forward** to forward the email.

Initiate SMS conversations from CSM Agent Workspace

Compose an SMS message from CSM Agent Workspace to interact with a customer contact or a consumer regarding customer service cases.

Before you begin

Role required: agent_workspace_user

Ensure that an administrator has configured the Conversational SMS Integration with Twilio application. For more information, see Conversational SMS Integration with Twilio.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. On the Agent Workspace Home page, navigate to **Agent Workspace** > **Lists** > **Interactions** > **My Interactions**.
3. In the My Interactions list, modify an existing interaction or create another interaction.
   - To modify an existing interaction, select the interaction number in **Number** column of the My Interactions list.
   - To create another interaction, click **New** in the My Interactions list.
4. On the Details tab of the workspace form, fill in the details for a new interaction or modify the details.
   For more information about the form, see CSM workspace form features.

   Note: The user profile associated with an interaction is configured by an administrator by using the `AgentInitiatedConversationUtil` extension point. By default, the `AgentInitiatedMessagingUtilExtPointImpl` script include that implements the `AgentInitiatedConversationUtil` extension point is available for the Conversational SMS Integration with Twilio application. For more information, see Associate user profiles on messaging interactions.

5. Click **Compose SMS**.
6. On the form, fill in the fields.

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Compose SMS form

Field	Description
From	Provider phone number of the SMS channel. ○ If there is only one provider phone number, the From list is automatically set to the provider phone number. ○ If there are multiple providers configured for the SMS channel, you can select a phone number in the From list.
To	Phone number of the consumer or customer contact. The phone number is in the E.164 format and automatically set to the phone number of the consumer or customer contact associated with the interaction record. By default, the user profiles for consumers and customer contacts and the format of their phone numbers are validated for the SMS channel. If you select **Other** from the To list, you can manually enter a phone number of the consumer or customer contact. Any manually entered phone number is automatically converted to the E.164 format. For more information, see Phone number fields.
Message	Message to be sent to the consumer or customer contact.
Attachment	File to be sent as an attachment. Click **Attach File** to browse and select a file. **Note:** By default, you can attach only images to the message. However, an administrator can configure the Attachment API to upload more file types. For more information, see Attachment - POST /now/attachment/upload.

7. Click **Send**.

Result

The interaction record of type messaging is created or updated based on the workflow as discussed in the following table.

Messaging interaction record workflows and results

Workflow	Results
No active interaction record available	• A new interaction record of type messaging for the SMS channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.

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Messaging interaction record workflows and results (continued)

Workflow	Results
An active interaction record associated with a live agent exists	• The interaction details are appended to the existing interaction record for the SMS channel. • If the message was initiated by an agent not associated with the existing interaction record, the agent is added to the Live Group Profile [live_group_profile] table. However, there's no change in assignment of the interaction.
An active interaction record associated with the virtual agent exists	• The existing interaction record with the virtual agent is closed. • A new interaction record of type messaging for the SMS channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.
An active interaction record associated with a different user exists	• The existing interaction record with the earlier user is closed. • A new interaction record of type messaging for the SMS channel is automatically created and assigned to the agent. • The user profile associated with the existing interaction record is deactivated. • The user profile currently associated with the new interaction record is created. • The agent is added to the Live Group Profile [live_group_profile] table.

Initiate messaging conversations from CRM Workspace

Compose an SMS message from CRM Workspace to interact with a customer contact or a consumer regarding customer service cases.

Before you begin

Ensure that an administrator has completed the following tasks:

- Configured the Agent-Initiated Messaging Interface application. For more information, see Agent-initiated messaging interface.
- Configured at least one qualifying messaging channel for the agent-initiated messages. For more information, see Determine whether messaging channels are available for agent-initiated messages.

Role required: agent_workspace_user

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Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace Home**.
2. On the CSM Configurable Workspace Home page, navigate to **Lists** > **Interactions** > **My Interactions**.
3. In the My Interactions list, select the interaction number in **Number** column of the My Interactions list.

   Note: Ensure that the interaction type is other than messaging and the interaction state is not closed complete or closed abandoned.

4. On the Details tab of the workspace form, fill in the details for a new interaction or modify the details.
   For more information about the form, see CSM workspace form features.

   Note: The user profile associated with an interaction is configured by an administrator by using the `sn_agent_initiated.AgentInitiatedMessagingUserDocument` extension point. The `AgentMessagingInteractionUserDocument` script include that implements the `sn_agent_initiated.AgentInitiatedMessagingUserDocument` extension point is available for the Agent-Initiated Messaging Interface application. For more information, see Associate user profiles with agent-initiated messages.

5. Click **Compose Message**.
6. On the form, fill in the fields.

Compose Message form

Field	Description
Channel	Messaging channel that is installed with the application available for a service channel. For example, select **SMS** to send an SMS message. The SMS messaging channel is available when an administrator has installed the Conversational SMS service channel application. An administrator can configure whether a messaging channel is available for agent-initiated messages. For more information, see Determine whether messaging channels are available for agent-initiated messages.
To	Recipient ID of the consumer or customer contact, or when both are not available the recipient ID of the user for which the interaction was opened. The recipient ID is pre-populated from the User [sys_user] table record of the consumer, customer contact, or opened for user. If the entered ID is a phone number, it must be an E.164-compliant phone number or is automatically converted to the E.164 format. For more information, see Phone number fields. An administrator can configure the format of the recipient ID based on the selected channel and associate user profiles with agent-initiated messages. For more information, see Validate recipient IDs for agent-initiated messages and Associate user profiles with agent-initiated messages.

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Field	Description
	If you select **Other** from the To list, you can manually enter a ID of the consumer or customer contact. Any manually entered phone number is automatically converted to the E.164 format. For more information, see Phone number fields. **Note:** The **Other** list value appears only when an administrator has configured the option to enter recipient ID manually for the messaging channel. For more information, see Set up agent-initiated message interface for a messaging channel.
From	Provider ID of the messaging channel. ○ If there is only one provider configured for the channel, the From list is automatically set to the provider ID. ○ If there are multiple providers configured for the channel, you can select an ID in the From list.
Message	Message to be sent to the recipient.
Attachment	File to be sent as an attachment. Click **Attach File** to browse and select a file. **Note:** By default, you can attach only images to the message.

7. Click **Send**.

Result

The interaction record of type messaging is created or updated based on the workflow as discussed in the following table.

Messaging interaction record workflows and results

Workflow	Results
No active interaction record available	• A new interaction record of type messaging for the channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.
An active interaction record associated with a live agent exists	• The interaction details are appended to the existing interaction record for the channel. • If the message was initiated by an agent not associated with the existing interaction record, the agent is added to the Live Group Profile [live_group_profile] table. However, there's no change in assignment of the interaction.

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Messaging interaction record workflows and results (continued)

Workflow	Results
An active interaction record associated with the virtual agent exists	• The existing interaction record with the virtual agent is closed. • A new interaction record of type messaging for the channel is automatically created and assigned to the agent. • The agent is added to the Live Group Profile [live_group_profile] table.
An active interaction record associated with a different user exists	• The existing interaction record with the earlier user is closed. • A new interaction record of type messaging for the channel is automatically created and assigned to the agent. • The user profile associated with the existing interaction record is deactivated. • The user profile associated with the new interaction record is created. • The agent is added to the Live Group Profile [live_group_profile] table.

Create a work plan in Customer Service Management (CSM) Configurable Workspace

Create a work plan in the Customer Service Management (CSM) Configurable Workspace so that your agents can fulfill and implement the maintenance requirements for an install base item.

Before you begin

Role required: sn_customerservice_agent and sn_fsm_planned_wm.planned_work_admin

Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, navigate to **Customer** > **Accounts**.
3. Open an account and navigate to the Install Base Items related list.
4. Open an install base item from the list.
5. On the **Planned Maintenance** tab, open **Work plans** and select **New**.
6. On the form, fill in the fields.

Work plan form on the Customer Service Configurable workspace

Field	Description
Name	Name of the work plan.
Type	Type of trigger that determines when work should be performed.

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Field	Description
	○ **Model based:** Base the work plan on a specified model of a CI. ○ **General:** Base the work plan on a table and filter. ○ **Install base:** Base the work plan on specified models of install base items **Note:** ○ Model-based plans apply only to hardware models, specifically ones that have at least one model category defined. ○ The Install base plan type is available only if the Customer Service Install Base Management (com.snc.install_base) plugin is activated.
Model	One or more product catalog items that you can select to identify the configuration items (CIs) or install base that require maintenance. When you select a model, the associated table appears in the Table field. For example, if you select a specific PC model, the **Table** field displays **Computer [cmdb_ci_computer]**. This field appears if you selected either the **Model based** or **Install base** type. For Install base type. The **Table** field automatically fills in an appropriate table based on the selected model.

7. Select **Save**.

Result

You created a work plan in Customer Service Management (CSM) Configurable Workspace.

Using Business Location 360

Enable customer service agents to get a comprehensive, 360-degree view of the business location issues, so that they get the required contextual data to effectively resolve the reported issues within the Customer Service Management (CSM) application.

Overview of Business Location 360

By using the Service Model Foundation data model framework, your location staff members can request assistance for their operations either from the central support team or peer business locations. To handle these cases effectively, customer service agents require a complete, 360° view of the business location.

The Business Location 360 template enables agents to get a comprehensive view that includes the crucial contextual information that they need for resolving reported issues. Your administrator can customize the Business Location 360 template to add data sources, show additional information, or represent entities like stores, government agencies, healthcare organizations, automotive dealerships, or departments. For more information about configuring the Business Location 360 template, see CRM Workspace page templates.

Note: Your administrator can activate the Business Location 360 capabilities by using the Business Location (com.snc.business_location) plugin.

This example shows the Business Location 360 page with the 360-view of different widgets like the products installed, point of contact, services offered, and more. These components enable customer service agents to get a comprehensive, 360-degree view of the business location issues to help them effectively resolve the reported issues.

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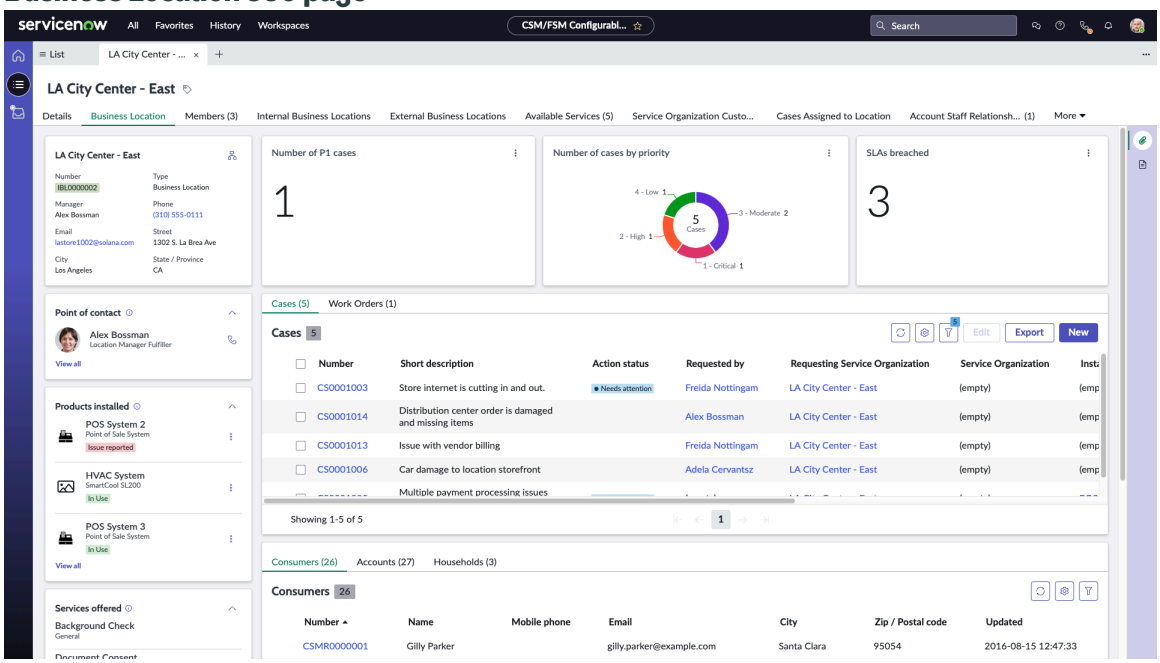
Business Location 360 page



Benefits of using Business Location 360

By using the Business Location 360, your location staff members get the following benefits:

- Contextual information about an issue. Your customer service agents can view the contextual information about an issue and then create cases about a business location all from one place.
- Visibility into issues and trends. Your customer service managers can visually identify store-specific issues and broader trends.
- Ability to configure actions and pages. Your administrators can configure additional actions and pages based on the Business Location 360 template.

Related topics

Access Business Location 360 as a customer service agent

Access Business Location 360 as a customer service manager

Business Location 360 components

Business Location 360 components

Customer service agents can resolve reported business location issues by using different components on the Business Location 360 page in the Customer Service Management (CSM) application.

Components on the Business Location 360 page

The following list of components are on the Business Location 360 page:

- Location information
- Point of contact
- Products installed
- Services offered
- All staff

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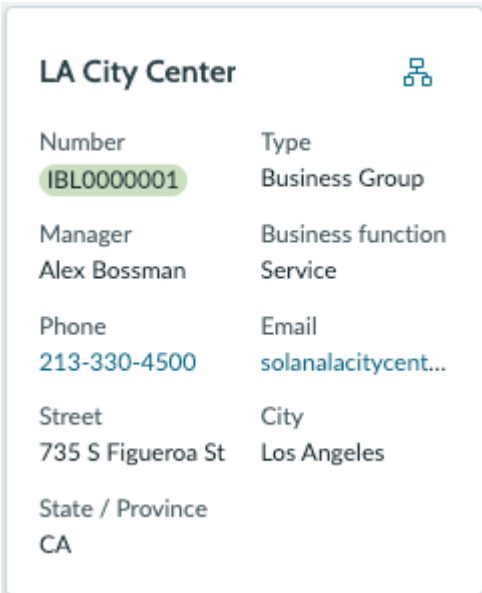
- Key performance indicators (KPIs)
  - Number of P1 cases
  - Number of cases by priority
  - Service level agreements (SLAs) breached
- Task tab
  - **Cases**
  - **Work orders**
- Customer tab
  - **Customers**
  - **Accounts**
  - **Households**

Note: You can customize these components according to your requirements by using the Business Location 360 template. The Business Location 360 template enables agents to get a comprehensive view that includes the crucial contextual information that they need for resolving reported issues. Your administrator can customize the Business Location 360 template to add the data sources, show the additional information, or represent the entities like stores, government agencies, healthcare organizations, automotive dealerships, or departments.

Location information

The location information component displays the location information details for the record. The following example shows a location information component that displays the name and type of the location, the address, email, phone number, and the manager's name.

Location information component



The **Email** and **Phone** links are clickable. When you select these links, the information is copied to the clipboard.

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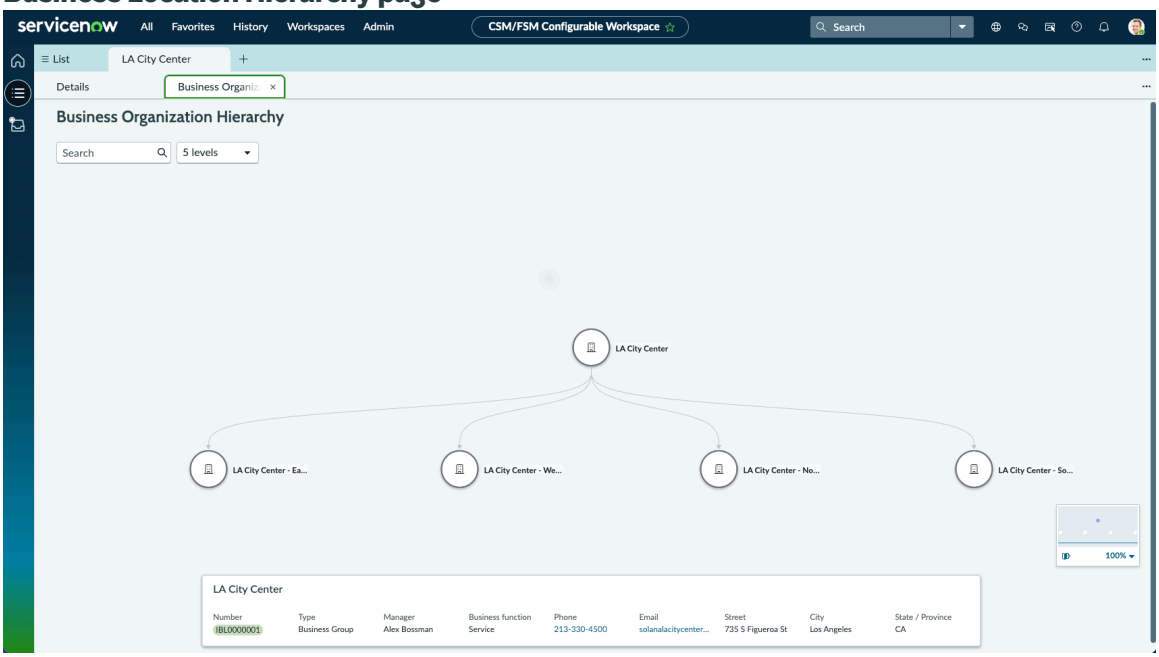
Note: If your administrator hasn't enabled Computer Telephony Integration (CTI), your contact numbers are copied to the clipboard instead of calling the numbers directly. For more information about integrating Computer Telephony Integration (CTI), see Computer Telephony Integration.

On the location information link, navigate to the business location hierarchy view page by selecting the view hierarchy icon .

The following example shows a business location parent-child hierarchy with multiple nodes.

Business Location Hierarchy page



You can use this page to visualize the parent-child hierarchy structure, search for business locations, and perform different contextual actions on the nodes. You can also perform the following different contextual actions on the node:

- Set the node as a home or parent node.
- View the location details.
- Create a case from the node.

You can get the location details of the node that you select. Also, if there's a black dot on any node, it signifies a business location issue.

Note: The business location hierarchy page displays a maximum of 250 nodes. You can use the search functionality to find the node that you're looking for.

Point of contact

The point of contact component displays the primary points of contact that are available at a business location. The following example shows that the point of contact component can display the different points of contact at a business location.

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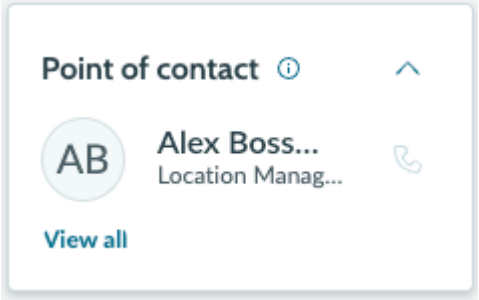
Point of contact component



Selecting **View all** takes you to the Business Location member page where you can get the details of all the points of contact at a business location.

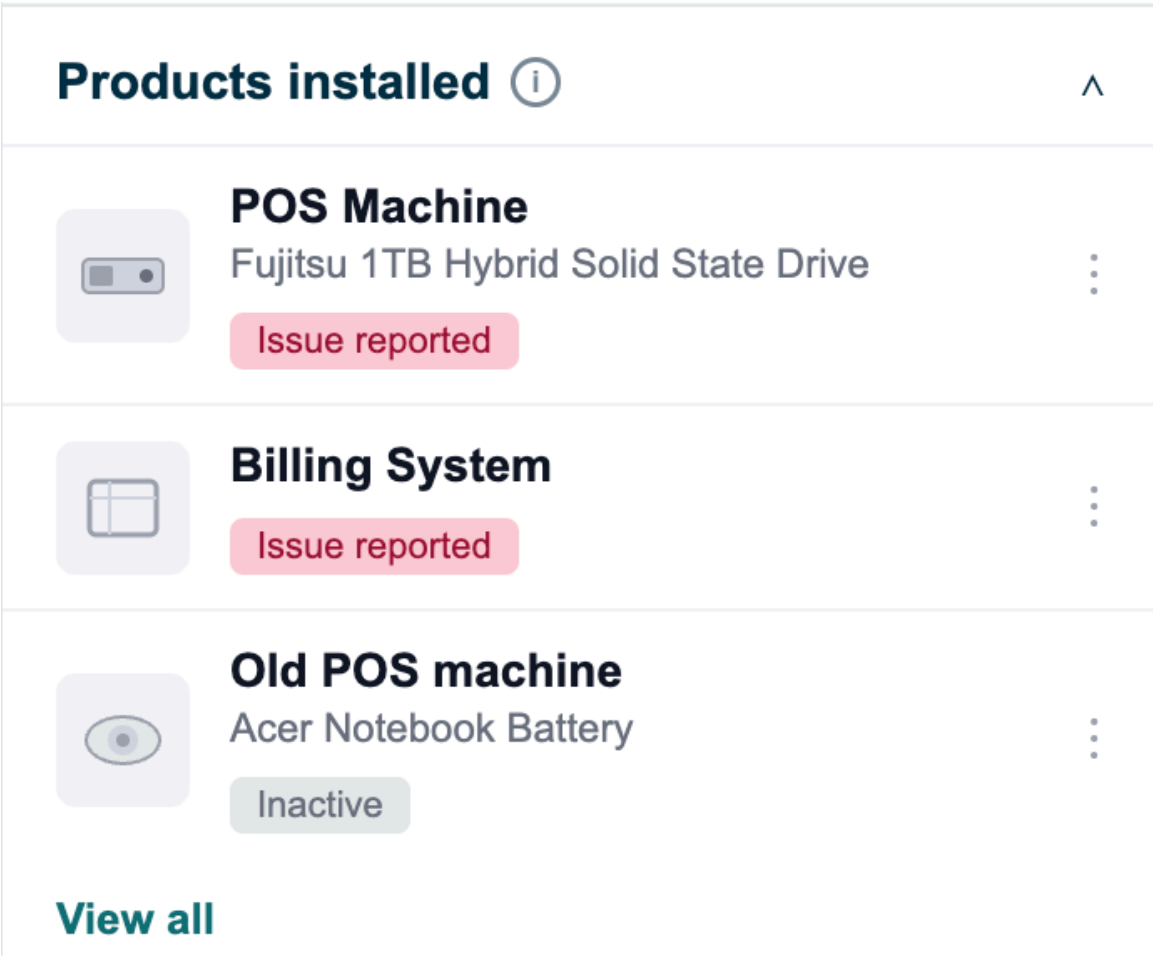
Note: By default, only three users are displayed.

Products installed

The products installed component displays the information about the install base items at a business location. For example, you can see the install base name, product model name, and the status on this component. The following example shows the products installed component that provides information about the listed install bases at a business location.

Note: You can access this component only after your administrator activates the Customer Service Install Base Management plugin (com.snc.install_base).

Products installed component



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If the listed products display **Issue reported** in the highlighted text, it indicates that there's an active case reported for that install base item. The products within this component are sorted in the following order:

- Install base items with a recently reported case.
- Recently deployed install base items.

You can view the product details or create a case by selecting the Overflow icon ⋮.

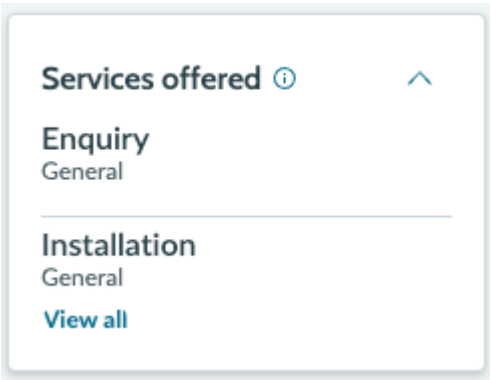
Selecting **View all** takes you to the **Products installed** page where you can get the details of all the products installed at a business location.

Note: By default, only three products are displayed.

Services offered

The services offered component displays the list of services that are offered at a business location. The following example shows the Services offered component that provides information about the list of all service names and the types that are available at a business location.

Services offered component



Note: By default, only three services are displayed and these services are sorted in the ascending order.

All staff

The all staff component displays the list of the staff members who are working at a business location and includes both the internal and external staff members. The following example shows the All staff component.

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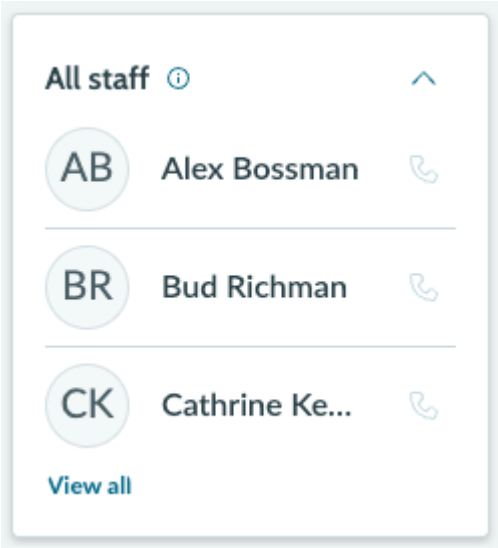
All staff component



Selecting **View all** takes you to the **All staff** page where you can get the details of all the staff members that are available at a business location.

Note: By default, only three staff members are displayed and these services are sorted in the ascending order of user name.

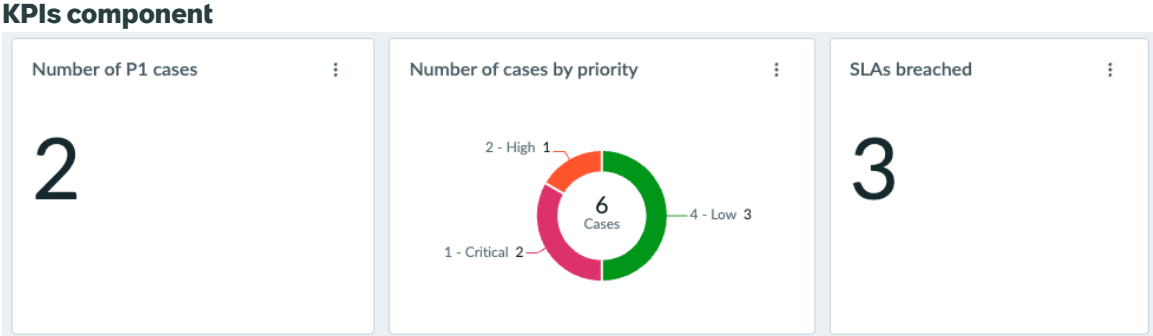
KPIs

The KPI components are performance analytic indicators that display multiple types of information that are related to a case such as the following KPIs that are shipped out of the base system:

- Number of P1 cases
- Number of cases by priority
- SLAs breached

The following example shows a list of the different KPIs. The list includes the number of P1 cases, the number of cases by priority, and the SLAs that were breached.

KPIs component



These KPIs are filtered to show the current business location-related details. Your administrator can customize these KPIs according to your location's requirements by using the UI Builder.

Task tab

The task tab component displays the following cases and work- order tabs where you can see the cases and work orders that are associated with a business location:

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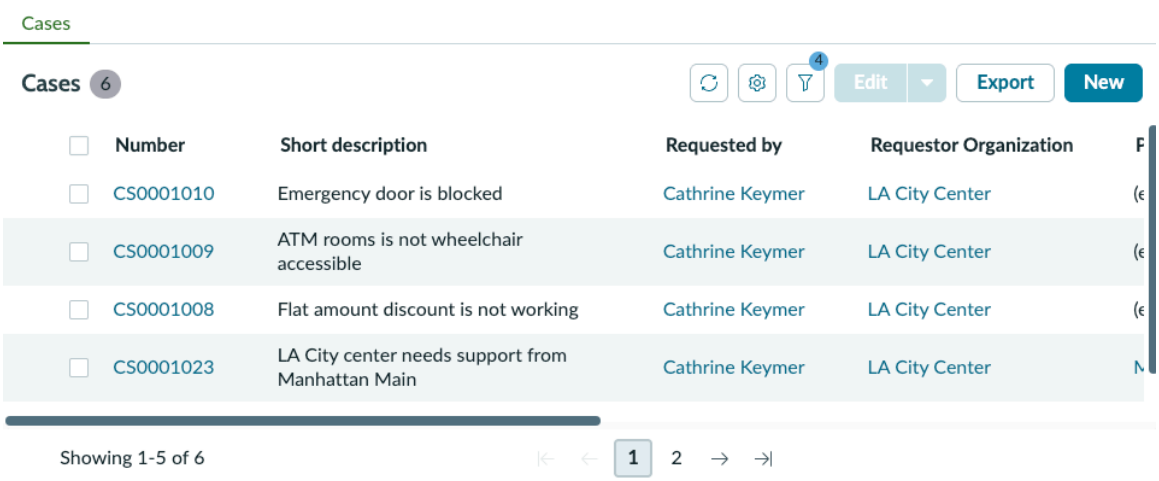
- **Cases** tab. Displays the active cases that have a requesting service organization as the current business location order by the date that the case was last updated. The account, consumer, and household fields are empty.
- **Work orders** tab. Displays the work orders that have the service organization as the current business location. For this type of work order, the household field is empty and the state field isn't completed. the state field is completed with errors, or the state field is closed.

The following example shows a list of the cases that are associated with a business location.

Task tab component



Note: A maximum of five records are displayed per page.

Customer tab

The customer tab component displays the list of consumers, accounts, and households that are associated with a business location:

- **Consumers** tab. Displays all the consumers or a filtered list of consumers. This information is based on the supported consumers that are associated with the business location.
- **Accounts** tab. Displays all the accounts or a filtered list of accounts. This information is based on the supported accounts that are associated with the business location.
- **Households** tab. Displays all the households or a filtered list of households. This information is based on the supported households that are associated with the business location.

  Note: You can access this component only after the Customer Household Data Model plugin (com.snc.household) is activated.

- **Internal Organizations** tab. Displays all the internal organizationsor a filtered list of internal organizations. This information is based on the supported internal organizationsthat are associated with the business organizations.
- **External Organizations** tab. Displays all the external organizations or a filtered list of external organizations. This information is based on the supported external organizations that are associated with the business organization.

The following example shows a list of the consumers that are associated with a business location.

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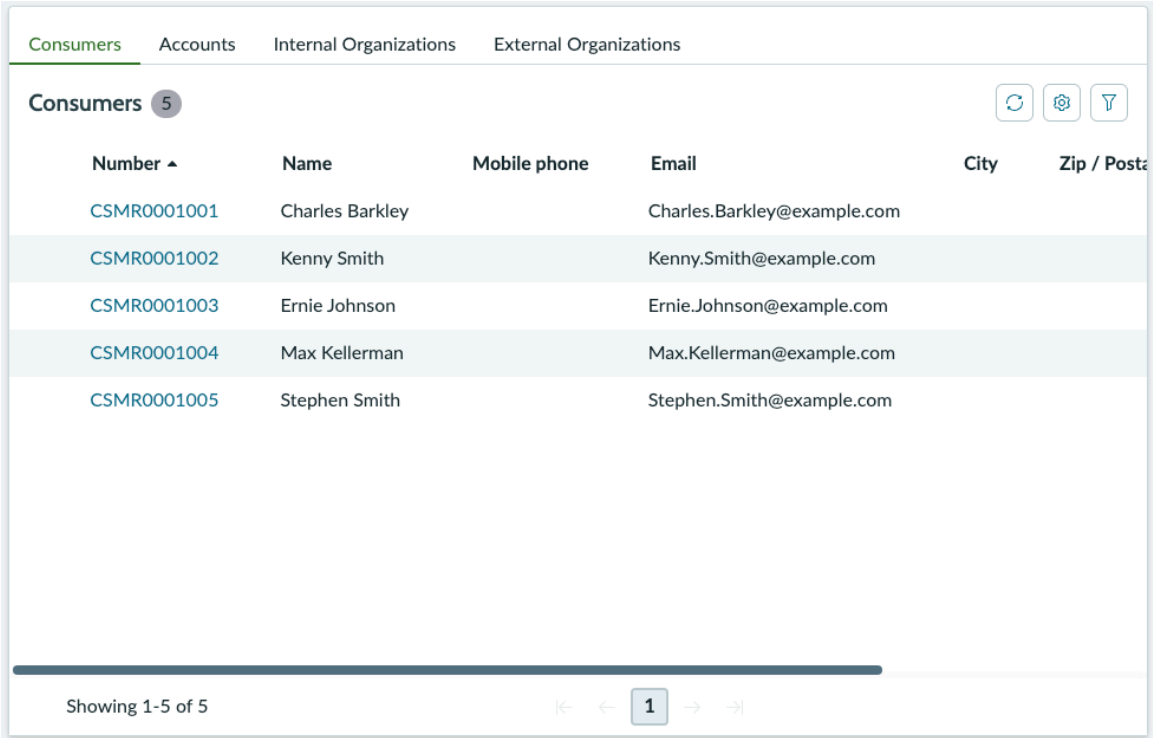
Customer tab component



Note: A maximum of 10 records are displayed per page.

Related topics

- Using Business Location 360
- Access Business Location 360 as a customer service agent
- Access Business Location 360 as a customer service manager
- Access Business Location 360 as a location service agent

Access Business Location 360 as a customer service agent

Access the business location 360 page in the Customer Service Management (CSM) application as a customer service agent. You can get a comprehensive, 360-degree view of the business location issues all in one place.

Before you begin

Role required: sn_customerservice_agent, svc_location_consumer_agent, sn_customerservice.svc_location_agent, and admin

About this task

As a customer service agent (sn_customerservice_agent), you can use the business location details to provide the case resolutions or create cases for a business location.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the **Lists** tab, select **Cases** > **All**.
3. In the Cases list, select a case record with a business location.
4. Access the Business Location 360 page by selecting the **Business Location** tab.

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Related topics

Business Location 360 components

Access Business Location 360 as a customer service manager

Access Business Location 360 as a location service agent

Access Business Location 360 as a customer service manager

Access the business location 360 page in the Customer Service Management (CSM) application as a customer service manager. You can get a comprehensive, 360-degree view of the business location issues all in one place.

Before you begin

Role required: sn_customerservice_manager, svc_location_consumer_agent, sn_customerservice.svc_location_agent, and admin

About this task

As a customer service manager (sn_customerservice_manager), you can view the issues that are reported at your individual business locations and across hierarchies.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the CSM/FSM Configurable Workspace **Lists** tab, select **Service Organizations** > **Internal/External Business Locations**.
3. In the Internal/External Business Locations list, select a record.
4. Access the Business Location 360 page by selecting the **Business Location** tab.

Related topics

Business Location 360 components

Access Business Location 360 as a customer service agent

Access Business Location 360 as a location service agent

Access Business Location 360 as a location service agent

Access the business location 360 page in the Customer Service Management (CSM) application as a customer service agent. You can get a comprehensive, 360-degree view of the business location issues all in one place.

Before you begin

Role required: sn_customerservice_agent, svc_location_consumer_agent, sn_customerservice.svc_location_agent, and admin

About this task

As a customer service agent (sn_customerservice_agent), you can use the business location details to provide the case resolutions or create cases for a business location. As a location service agent, you can view supported business locations based on supported business location criteria on the business location 360 page for external locations.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. On the **Lists** tab, select **Cases** > **All**.

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3. In the Cases list, select a case record with a business location.
4. Access the Business Location 360 page by selecting the **Business Location** tab.

Related topics

Business Location 360 components

Access Business Location 360 as a customer service agent

Access Business Location 360 as a customer service manager

Outsourced Service Provider agent tasks

Outsourced service provider agents (OSPs) extend the capabilities and reach of an organization's customer service operations by providing basic customer service to customers and consumers.

Some key functions that outsourced service provider agents can perform include the following.

Outsourced service provider agent tasks

Task	Description
Create work order	An OSP agent can create a work order so that it can be assigned to a Field Service agent.
Escalate a case	An OSP agent can escalate a case when unable to resolve or fulfill a case for various reasons such as technical limitations, knowledge gaps, or access restrictions.
View account or consumer assets	An OSP agent can view the assets owned by an account or consumer which helps in creating or fulfilling a case.
View account contracts	As an OSP agent, you can view contracts owned by accounts or consumers in order to create or fulfill a case.
View customer or consumer data	As an OSP agent, you can view the customer or consumer data to fulfill cases.
Create a case task	An OSP agent creates a case task after a case has been assigned. As an agent, you can work on the case adding work notes and additional comments.
Assign a case	Assign a case to yourself or another Outsourced Service Provider (OSP) agent within the organization to start working on the case or to fulfill the case.
Create an appointment	As an agent, you can create an appointment for the requester of a case.

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Outsourced service provider agent tasks (continued)

Task	Description
Transfer a case	The OSP agent or manager, if unable to resolve a case, transfers the case manually to an enterprise's internal agent.
View cases	As an OSP manager or agent, you can view all application modules with the list of cases for customers, consumers, and products served by your organization.
View case related emails and respond	As an OSP agent, you can view the list of emails related to a case that is assigned to you. You can respond to a case by creating a new email and sending it to the stakeholders of a case.
Report knowledge gap from a case	When an OSP agent has a knowledge gap which impacts the ability to resolve a case, the agent can report the knowledge gap.
Propose a major case	As an OSP agent, you can propose a major case from the existing customer service case assigned to you.
Close a case	Users with OSP agent role can propose a solution to a case and close the assigned cases.
Contextual search	Users with OSP agent role can search for related information to fulfill a case. The search results returned are the list of entities that the agent is entitled to as per the data governance.
View list of entitlements	As an OSP manager or agent, you must view entitlements for an account or consumer to create or fulfill cases.

Create work order

An OSP agent can create a work order so that it can be assigned to a Field Service agent.

Before you begin

Role required: sn_csm_ocs.ext_agent and you must have installed Customer Service Management with Field Service Management plugin.

Procedure

1. Go to **My Cases** and open a case.
2. Click **Work Orders** related list.
3. Click **New**.

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4. Click **Submit**.
5. View work order status to update the customer of the status.

> **Note:** You cannot create a new work order until the previous one is closed or deleted.

Escalate a case

An OSP agent can escalate a case when unable to resolve or fulfil a case for various reasons such as

Before you begin

Role required: sn_crm_escalation_admin, sn_crm_foundation_admin, or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Click **Escalate Case** related link.
3. Fill in the fields on the Escalation form, as appropriate.

Option	Description
Request Source	If Customer or Internal
Reason	Reason for escalation such as inactivity, lack of progress, or customer imposed deadline.
Escalation Severity	Severity of escalation such high, medium, and so on.
Escalation Template	An escalation template determines how an es calation request is processed.
Watch list	Add users to the escalation template watch list. These users receive notifications for all es calations that use this escalation template.
Escalation Justification	Additional information that explains why this escalation is needed.

4. Click **Submit**.

View account or consumer assets

An OSP agent can view the assets owned by an account or consumer which helps in creating or fulfilling a case.

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases**.
2. Open a case and click the preview icon next to the **Account** or **Consumer** field.
3. Click **Open Record**.
4. Click **Assets** related list.

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The list of assets belonging to the account or consumer is visible.

5. Click on an asset to view the read-only fields.

View account contracts

As an OSP agent, you can view contracts owned by accounts or consumers in order to create or fulfill a case.

Before you begin

Role required: sn_csm_ocs.ext_manager/sn_csm_ocs.ext_agent

Procedure

1. Open the case form.
2. Click the **Preview** icon next to the **Account** or **Consumer** field.
3. Click **Contracts** related list.
4. View the list of assets belonging to an account or consumer and fulfill a case.

View customer or consumer data

As an OSP agent, you must view the customer or consumer data to fulfill cases.

Before you begin

Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Open a case and click the preview icon next to the **Account** or **Contact** field.
3. Click **Open Record**.
   The following related lists are visible for you to work on and fulfill the cases:
   - **Contacts**
   - **Addresses**
   - **Cases**
   - **Assets**
   - **Contracts**
   - **Entitlements**
   - **Account Relationships**
   - **Sold Products** and
   - **Install Base**

Create a case task

An OSP agent creates a case task after a case has been assigned. As an agent, you can work on the case adding work notes and additional comments.

Before you begin

Role required: sn_csm_ocs.ext_agent

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Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases** and open a case.

   Note: The timeline of the case is displayed at the top of the case form.

2. Click **Tasks** related list.
3. Click **New** to create a new task.
   The **Edit** button allows you to add existing case tasks to a case from the **Collection** list.
4. Fill in the fields on the new record form, as appropriate.

Option	Description
Subject	Subject for the case.
Description	Description for the case.
Work notes list	Work notes for the case
Email address	Email id of the customer.
Additional comments	Comments related to the case, if any.

5. Click **Submit**.

   Note: You can also close the case task.

Assign a case

Assign a case to yourself or another Outsourced Service Provider (OSP) agent within the organization to start working on the case or to fulfill the case.

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Click and open a case from the available list.
3. Click **Assign to me**.

   Note: If the case is already assigned, the **Assign to me** button isn't available.

Create an appointment

As an agent, you can make an appointment with the requester of a case.

Before you begin

Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **My Cases**.
2. Open a case.
3. Click **Appointments** related list.

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4. Fill in the fields on the Appointment form, as appropriate.

Field	Description
To	The customer's name.
Enter email address	Email id of the customer.
Start time	Select the start time and date.
End time	Select the end time and date.
Reminder (minutes)	Select reminder for the appointment.
Subject	Enter the subject
Location	Enter location.
Message	Enter message for the appointment.

5. Click **Submit** and the appointment appears under **Appointments** related list in **Ready** state .
6. Edit the appointment and click **Send activity** to send the appointment to the specified email address.

Note: You can also cancel the appointment using the **Cancel appointment** related link.

Transfer a case

The OSP agent or manager, if unable to resolve a case, transfers the case manually to an enterprise's internal agent.

Before you begin

Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

About this task

You can transfer a case by selecting the reason for transfer, adding transfer notes, and transfer the case manually. The case is transferred based on the default assignment group setup while defining an OSP. Else, the case is transferred based on AWA or assignment rules, that have been previously setup.

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case that you want to transfer.
3. Cick **Transfer Case**.
4. Select the reason for transferring the case from the **Reason** drop-down list.
5. Enter additional information regarding the case in the **Notes** field.
6. Click **Save**.
   The case is transferred successfully to the enterprise's internal manager. When you go back to **All** cases and view the case, you can view the transfer information under **Outsourced Case Transfer Request** related list.

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View cases

OSP manager or agent, you must be able to view all application modules with the list of cases for customers, consumers, and products served by your organization.

Before you begin

Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases**.
   You must be able to see **My Cases**, **All**, **Open**, and **Unassigned** cases. Users who aren't authorized or who don't belong to this OSP won't see any case.

   Note: As an OSP manager you can view cases that are assigned to the groups you manage.

2. Select **All**, open a case, and assign the case to yourself.
   The **Assigned to** field is pre-filled with your name.

View case related emails and respond

As an OSP agent, you can view the list of emails related to a case that is assigned to you. You can respond to a case by emailing stakeholders.

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case that you want to respond to.
3. Select **Emails** related list.
   The list of emails sent earlier if any, is displayed.
4. Select **New Email** to create an email.
   The recipient fields are pre-filled. You can add additional recipients if required.
5. Enter the body text in the Compose Email window.
6. Select the Attachment icon ( ) if you want to add an attachment to the email.
7. Select **Send**.

Report knowledge gap from a case

An OSP agent can report a knowledge gap for a case.

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case.
3. Is knowledge available for the case in the **Knowledge Gaps** related list.
4. Click **Report Knowledge Gap** related link.
5. Enter the description.

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6. Click **Submit**.
   A knowledge gap is created and you can view it under the **Knowledge Gaps** related list.

   For more details, see Report a knowledge gap

Propose a major case

As an OSP agent, you can propose a major case from the existing customer service case assigned to you.

Before you begin

Role required: sn_csm_ocs.ext_agent

About this task

Cases in these states can be proposed as a major case candidate:

- New
- Open
- Awaiting Info

Cases that are Resolved, Closed, or Canceled can't be proposed as a major case candidate.

When proposing a case as a major case candidate, agents can specify the reason or justification for the case in the Propose Major Case pop-up window. Information provided in the **Work notes** and **Business Impact** fields are added to the Case form.

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case.
3. Right-click on the case form.
4. Select **Propose Major Case**.
5. In the Propose Major Case pop-up window, enter a reason for the proposal in the **Work notes** field.
   You can also choose to enter the business impact of the selected case in the **Business Impact** field.
6. In the Propose Major Case pop-up window, enter a reason for the proposal in the **Work notes** field.
7. **Optional:** Enter the business impact of the selected case in the **Business Impact** field.
   This information is added to the Case form in the **Work notes** field and the **Business Impact** field in the Major Case Information section.
8. Select **Propose**.
   An entry is added to the **Work notes** on the Case form that the case was proposed as a major case candidate. The information entered in the Propose Major Case pop-up window is also added to the Case form.

Close a case

Users with OSP agent role can propose a solution to a case and close the assigned cases.

Before you begin

Role required: sn_csm_ocs.ext_agent

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Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **My Cases**.
2. Open a case that you want to close.
3. Select the **Closure information** tab on the case form.
4. In the **Resolution Code** field, select the appropriate code that best describes the resolution type (for example, Solved (Permanently) or Workaround Provided).
5. Select the **Resolution code** from the drop-down list.
6. In the **Resolution Notes** field, enter a clear description of the resolution steps taken and the outcome.
7. Select**Close Case**.
   The case state changes to **Closed** state.

Contextual search

An OSP agent can search for related information to fulfill a case. The search results returned are the list of entities that the agent is entitled to according to the data governance.

Before you begin

Role required: sn_csm_ocs.ext_agent

Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Open a case to see the related search results according to the case description.

View list of entitlements

As an OSP manager or agent, you must view entitlements for an account or consumer to create or fulfil cases.

Before you begin

Role required: sn_csm_ocs.ext_manager or sn_csm_ocs.ext_agent

Procedure

1. Navigate to **Outsourced Customer Service** > **Cases** > **All**.
2. Open a case and click the preview icon next to the **Account** field.
   The customer account page is displayed.
3. Click **Entitlements** related list.
4. Open an entitlement and view the asset details to fulfill a case.

Manage schedules and sites

Manage agent scheduling and availability, use the mobile app to perform common tasks on the go, and manage and support your customer base with install base plans and contracts.

Manage schedules and sites

Topic	Description
Managing agent calendar	Customer service agents and field service technicians can use the agent calendar to see work schedules and assignments and

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Manage schedules and sites (continued)

Topic	Description
	also add personal events such as meetings or appointments.
Using Microsoft Outlook with CSM	Integrating Microsoft Outlook with CSM helps to improve collaboration among team members. Agents can share insights, discuss complex cases, and provide updates on customer issues effortlessly, fostering a more cohesive and responsive customer service environment.
Mobile experience for Customer Service Management	Manage customer service cases from a mobile device with the Customer Service Management mobile application. Stay connected and access information in real time to complete tasks quickly.
Install base work plans	You can create an install base work plan on the Customer Service Management application to get the details that are related to an install base item. Work plans help you to create, maintain, and view the basic details of an install base item. You can also plan for the regular and timely maintenance of the install base item.
Using Customer Contracts and Entitlements	Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate service contracts and contract lines to work on the services.

Managing agent calendar

Customer service agents and field service technicians can use the agent calendar to see work schedules and assignments and also add personal events such as meetings or appointments.

The agent calendar provides a tool for maintaining different work schedules or shifts and assigning agents and technicians to shifts for specific time periods. The calendar has the flexibility to accommodate work schedules that are fixed or varied and shifts that rotate by week, month, or other patterns. The agent calendar administrator creates the calendar configuration, including a schedule configuration for each calendar user and the types of tasks to display on the calendar.

The schedule information stored in the agent calendar is used by other ServiceNow applications and features, such as the assignment workbench, central dispatch, and auto assignment. The assignment workbench uses agent availability, based on upcoming work schedules and personal time off, when evaluating predefined criteria and recommending agents for case assignment. Auto assignment in Service Management core applications, such as Field Service Management and Facilities Service Management, evaluate agent work schedules before assigning tasks.

The agent calendar administrator has access to the Agent Schedule menu in the application navigator. This menu includes the following modules:

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- **Event Configuration**: create a configuration for each type of event or task displayed on the agent calendar.
- **Work Schedule**: create one or more work schedules for each calendar user.
- **Agent Personal Events**: create personal schedules for each agent and add events to those schedules.
- **Schedule**: create or modify schedules. For more information, see Schedules.

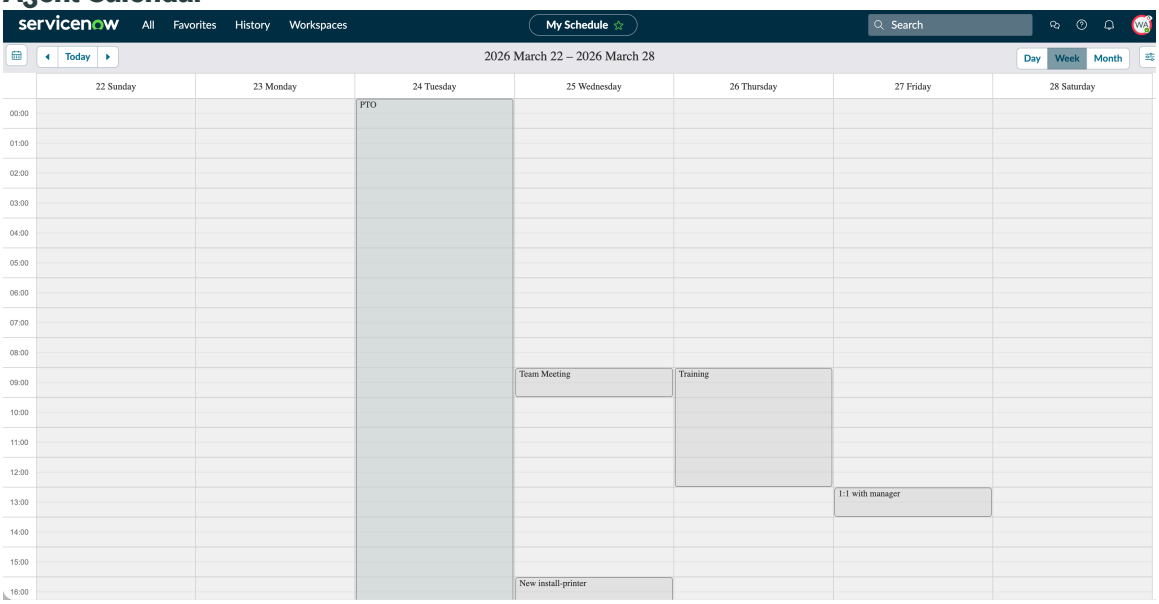
Viewing the calendar

Customer service agents and field service technicians with the agent_schedule_user role can access their personal calendars in the following ways:

- **Customer Service** > **My Schedule**
- **Field Service** > **Agent** > **My Schedule**

Note: The agent calendar is supported in the mobile application and the mobile web.

Agent Calendar



The calendar can display a single day, a week, or a month. Buttons in the calendar header allow you to switch views as well as go backward or forward in time. An agent's scheduled work hours are highlighted in gray and the current day is highlighted in blue. The agent calendar displays work or tasks assigned to the agent as well as personal events. Each type of event is displayed on the calendar using a different color.

Agents can add events to their calendars by double-clicking a specific time slot and entering the details in the New Event popup window or by clicking and dragging. Agents can also move events by dragging and dropping. Click an event to display a popup with event details and double-click an event to open the event record.

Plugins

The Agent Schedule plugin (com.snc.agent_schedule) is activated as part of the Customer Service Management and Field Service Management plugins.

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Tables

The Agent Schedule plugin adds the following tables.

Tables installed with the Agent Schedule plugin

Table	Description
Agent Work Schedule [agent_work_schedule]	Stores one or more work schedules for each agent, including the date range for the schedule and the schedule type.
Agent Personal Schedule [agent_events]	Stores personal calendar events for each agent, such as training, personal time off, or meetings.
Event Configuration [agent_schedule_task_config]	Stores a configuration for each type of task displayed on the agent calendar, such as case tasks or work order tasks.
Agent Schedule User Config [agent_schedule_user_pref]	Stores the agent's personalization data for the calendar. A user configuration is created automatically when a user with the agent_schedule_user role accesses their personal calendar.
Agent Schedule Relationship [agent_schedule_task_config_rel_user_pref]	Stores the relationships between agent configurations and event configurations. Relationship entries are created automatically based on a user's read access to the task tables selected in the event configurations.
Agent Schedule Definition Theme [agent_schedule_definition_theme]	Stores the colors used to display different types of tasks on the agent calendar.

User Roles

The following user roles are included with the Agent Schedule (com.snc.agent_schedule) plugin.

Roles included with Agent Schedule plugin

Role	Description
Agent schedule administrator [agent_schedule_admin]	Sets up the Agent Calendar configuration. Contains roles: • agent_schedule_user • schedule_admin
Agent schedule user [agent_schedule_user]	Allows customer service agents and field service technicians to access and update their personal calendars.

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Related topics

Creating and using schedules

Configuring an agent calendar

Configuring an agent calendar

Users with the agent calendar administrator role can perform several calendar configuration tasks.

Configuration overview

You can configure the following for an agent calendar:

- Create an event configuration

  Create configurations for each type of entry displayed on the agent calendar. Entries could include case tasks, work order tasks, appointments, or schedule entries such as event types that you could track and manage on the team calendar.

- Create a work schedule for an agent or technician

  Create one or more work schedules for a customer service agent or a field service technician.

- Create a personal event for an agent or technician

  Create personal events that appear on an agent's personal calendar.

- Create a schedule to use with the agent calendar

  Create a schedule to use with the agent calendar.

Related topics

Managing agent calendar

Use the agent calendar

Create an event configuration

Create event configurations to define and manage event types for the team calendar.

Before you begin

The schedule entry uses the Schedule Span [cmn_schedule_span] table to store different types of events.

The following types of schedule entries for event type configurations are available by default:

- Event — Appointment
- Event — Excluded
- Event — Meeting
- Event — Phone
- Event — Time Off
- Event — Other

These configurations are inactive by default. You can activate a configuration by navigating to **Agent Schedule** > **Event Configuration**, selecting an event type configuration, and setting the **Active** field to **true** for one or more event configuration types you would like to activate. Each configuration displays as a separate event type on the team calendar.

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Role required: agent_schedule_admin

Procedure

1. Navigate to **Agent Schedule** > **Event Configuration** and perform one of the following actions.

Option	Description
Create a configuration from an existing event configuration	**a.** Select the desired configuration. **b.** Right-click the form header and click **Insert and Stay**. A copy of the selected event type configuration is created.
Create a new event configuration	Click **New**.

2. Fill in the fields on the Event Configuration form, as necessary.

Event Configuration form

Field	Description
Name	A descriptive name for this configuration.
Config Label	Name displayed for this event in the agent calendar.
Color theme	Color used to display this type of schedule on the agent calendar.
Setup	
Setup	Setup method for this configuration. ○ **Simple:** use condition builder to set up this configuration. ○ **Scripted:** use advanced scripts to set up this configuration.
Table	The table where the tasks for this type of configuration are stored.
Filter	Use condition builder to create the desired conditions for the selected task type. For example, the event configuration for Case Tasks includes a filter on the task **State** field to display only those tasks that are open.
User Field	A field from the **Table** that provides the user assigned to the task. For example, the event configuration for Case Tasks uses the **Assigned To** field from the Task table [sn_customerservice_task]. When a case task is assigned, it appears on the agent calendar for the user selected in this field.
Event type	Type of schedule entry.
Display Field	A field from the **Table** that provides the information to be displayed for this event type on the agent calendar. For example, the event configuration for Case Tasks uses the **Subject** field from the Task table [sn_customerservice_task]. When a case task is assigned, the subject of the task appears on the agent calendar.

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Field	Description
Start Date Field	A field from **Table** that provides the start date for the task. For example, the event configuration for Case Tasks uses the **Expected start** field from the Task table [sn_customerservice_task]. When a case task is assigned, it appears on the agent calendar starting on the date and time specified in this field. The **Expected start** field must contain a value for the event to appear in Workforce. If the field is empty, the event will not be displayed.
End Date Field	A field from the **Table** that provides the end date for the task. For example, the event configuration for Case Tasks uses the **Due date** field from the Task table [sn_customerservice_task]. When a case task is assigned, it appears on the agent calendar ending on the date and time specified in this field. The **Due date** field must contain a value for the event to appear in Workforce. If the field is empty, the event will not be displayed. **Note:** Because the agent schedule administrator can select any fields from the **Task Table** for the **Start Date Field** and the **End Date Field**, it is possible that the end date may be earlier than the start date. In this event, the task is displayed on the agent calendar between the two points in time.
Script	Use advanced scripts to create the event configuration. **Note:** This field is available when the **Scripted** value is selected from the **Setup** field.

3. Perform one of the following actions:
   - If you created the configuration from an existing configuration, click **Update**.
   - If you created a new configuration, click **Submit**.

Create a work schedule for agents

Users with the agent schedule administrator role can create one or more work schedules for a customer service agent or a field service technician.

Before you begin

Role required: agent_schedule_manager, agent_schedule_admin

About this task

A work schedule includes a date range and a schedule type, such as day shift or evening shift. Agents and technicians can have multiple work schedules.

Procedure

1. Navigate to **All** > **Agent Schedule** > **Work Schedule**.
2. Click **New**.
3. Fill in the fields on the Agent Work Schedule form, as necessary.

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Agent Work Schedule form

Field	Description
From Date	The first day of the work schedule.
To Date	The last day of the work schedule.
User	The selected agent or technician.
Work Schedule	The selected schedule from the Schedules list.
Type	The type of work that the agent or technician is performing during this schedule: ○ Primary work ○ Other An agent can have only one primary schedule for a specific range of dates. Primary schedules cannot overlap.

4. Click **Submit**.

Create a personal event for an agent or technician

Users with the agent schedule administrator role can create personal events that appear on an agent's personal calendar.

Before you begin

Role required: agent_schedule_admin

About this task

Agents and technicians typically add personal events to their own calendars.

Procedure

1. Navigate to **All** > **Agent Schedule** > **Agent Personal Events**.
2. Select the personal schedule for the desired agent.
3. In the **Schedule Entries** related list, select **New**.
4. Fill in the fields on the Schedule Entry form, as necessary.

Schedule Entry form

Field	Description
Name	The name of the event.
Type	The type of event: ○ Time off ○ Appointment ○ Meeting ○ Phone call ○ Excluded ○ On call

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Field	Description
	○ Time off - in approval ○ Time off - rejected
Show as	Show this event on the agent's personal calendar as one of the following: ○ Busy ○ Free ○ Tentative ○ On call Select **Busy** to exclude the block of time from agent availability calculations for the auto- assignment and the case assignment workbench.
When	The start date and time of the personal event.
To	The end date and time of the personal event.
All day	Enable this check box if the event lasts all day.
Repeats	Create a repeating event by selecting the frequency. Depending on the selection, other fields are required to complete the frequency information. ○ Doesn't repeat ○ Daily ○ Every Weekday (Mon-Fri) ○ Every Weekend (Sat, Sun) ○ Every Mon, Wed, Fri ○ Every Tue, Thu ○ Weekly ○ Monthly ○ Yearly
Repeat every	Enter a number for the frequency of the repeated event.
Repeat on	For weekly events, select a day of the week.
Monthly type	For monthly events, select one of the following. These selections use the day and date in the **When** field as the basis for repetition. ○ Day of the month ○ Day of the week ○ Last day of the month ○ Last week of the month
Yearly type	For monthly events, select one of the following: ○ Day of the year: This selection uses the day and date in the **When** field as the basis for repetition. ○ Floating: For this selection, complete the **Float week**, **Float day**, and **Float month** fields.

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Field	Description
Repeat until	Select a date for the end of the repeated event.
Float week	For a floating yearly repeating event, select the week.
Float day	For a floating yearly repeating event, select the day.
Float month	For a floating yearly repeating event, select the month.

5. Select **Submit**.

Create a schedule to use with the agent calendar

Users with the agent calendar administrator role can create a schedule to use with the agent calendar.

Before you begin

Role required: agent_schedule_admin

About this task

Creating a schedule for the agent calendar uses the schedule feature. For more information, see Schedules.

Schedules are configured with two types of records.

- Schedule records specify a time zone and a type of schedule and use one or more schedule entries. Schedule records are saved in the Schedule [cmn_schedule] table.
- Schedule entry records specify the time periods that are included or excluded from a schedule. Schedule entries are saved in the Schedule Entry [cmn_schedule_span] table.

For more information on schedule fields, see Schedule fields.

Procedure

1. Navigate to **All** > **Agent Schedule** > **Schedule**.
2. Click **New**.
3. Complete the fields on the Schedule form.

Schedule form fields and descriptions

Field	Description
Name	Enter a unique name for the schedule.
Time Zone	Select the time zone for the schedule. If you select **Floating**, the time zone will be relative to whatever is accessing the item at any given time.
Parent	Select a parent schedule to constrain the new schedule.
Type	Enter a label that describes the purpose of the schedule. You can also use one of these system terms to determine how to process certain schedules:

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Field	Description
	○ **excluded:** excludes time periods from SLA counts. ○ **maintenance:** specifies time periods where change management activities are allowed. A schedule containing maintenance schedule entries cannot also contain blackout schedule entries. ○ **blackout:** excludes time periods from change management schedules. A schedule containing blackout schedule entries cannot also contain maintenance schedule entries.
Description	[Optional] Describe the schedule.

Note: The Schedule form displays a warning message if there are no active entries defined for the current schedule. If your schedule is a child schedule that only contains exclusions, ignore the message because exclusions are non-active entries.

4. Right-click the header bar and click **Save**.

Note: If you create a schedule of type **maintenance** and save the record, a UI policy hides the **Type** field from the form. To view or change the value for the **Type** field, view the list of schedules rather than the schedule form and add the **Type** column if necessary. You can double-click the cell for the value in the **Type** column and modify from the list view.

5. Configure one or more schedule entries.
6. Click **Submit**.

Use the agent calendar

Users with the agent calendar user role can add events to their personal calendar and configure the calendar to show or hide different types of events.

Related topics

Configuring an agent calendar

Managing agent calendar

Add an event to the agent calendar

Users with the agent schedule user role can add events to their personal calendar.

Before you begin

Role required: agent_schedule_user

Procedure

1. Navigate to your calendar.
   - **Customer Service** > **My Schedule**
   - **Field Service** > **Agent** > **My Schedule**
2. Double-click a timeslot or click and drag over a timeslot on the calendar to open the New Event form.

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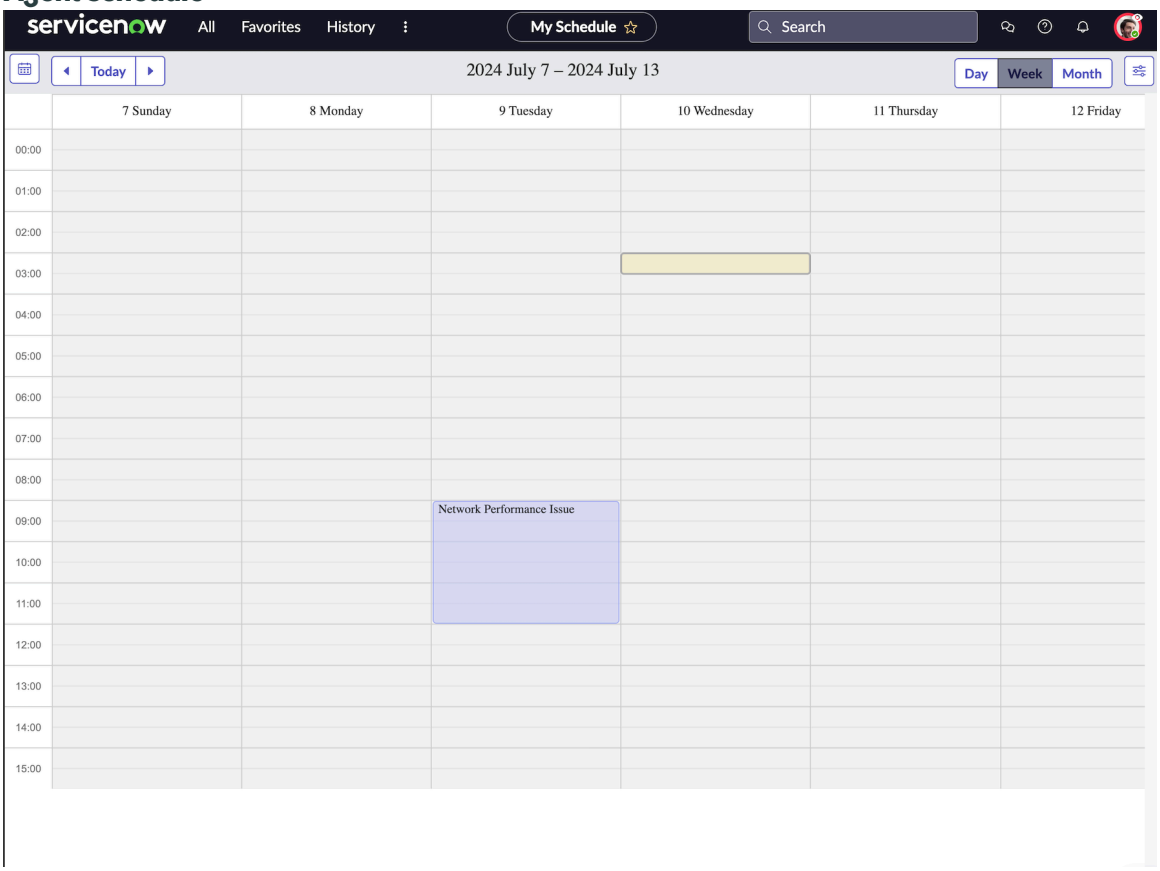
Agent schedule



3. Fill in the fields on the New Event form, as necessary.

New Event form fields and descriptions

Field	Description
Name	The name of the event.
Type	The type of event: ○ Time off ○ Appointment ○ Meeting ○ Phone call ○ Excluded ○ On call ○ Time off - in approval ○ Time off - rejected
Show as	Show this event on the agent's personal calendar as one of the following: ○ Busy ○ Free ○ Tentative ○ On call

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Field	Description
	Select **Busy** to exclude the block of time from agent availability calculations for the auto assignment and the case assignment workbench.
When	The start date and time of the personal event.
To	The end date and time of the personal event.
All day	Enable this check box if the event lasts all day.
Time zone	[Read only] If an agent has selected a specific time zone in their user profile, that time zone is displayed here and is used as the time zone for this event. Subsequent changes to the **Time zone** field in the user profile do not change the time zone designation for this event.
Repeats	Create a repeating event by selecting the frequency. Depending on the selection, other fields are required to complete the frequency information. ○ Does not repeat ○ Daily ○ Every Weekday (Mon-Fri) ○ Every Weekend (Sat, Sun) ○ Every Mon, Wed, Fri ○ Every Tue, Thu ○ Weekly ○ Monthly ○ Yearly
Repeat every	Enter a number for the frequency of the repeated event.
Repeat on	For weekly events, select a day of the week.
Monthly type	For monthly events, select one of the following. These selections use the day and date in the **When** field as the basis for repetition. ○ Day of the month ○ Day of the week ○ Last day of the month ○ Last week of the month
Yearly type	For monthly events, select one of the following: ○ Day of the year: this selection uses the day and date in the **When** field as the basis for repetition. ○ Floating: for this selection, complete the **Float week**, **Float day**, and **Float month** fields.
Repeat until	Select a date for the end of the repeated event.
Float week	For a floating yearly repeating event, select the week.

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Field	Description
Float day	For a floating yearly repeating event, select the day.
Float month	For a floating yearly repeating event, select the month.

4. Click **Submit**.
   The new event appears on the agent calendar and also in the **Schedule Entries** related list on the Agent Personal Schedule form.

Move an event on the agent calendar

Users with the agent schedule user role can move events on their personal calendar.

Before you begin

Role required: agent_schedule_user

Procedure

1. Navigate to your calendar.
   - **Customer Service** > **My Schedule**
   - **Field Service** > **Agent** > **My Schedule**
2. Use one of the following methods to move an event.

Option	Description
Click an event and drag it to a new day or time	The **When** and **To** fields in the event record are updated with the new information.
Double-click an event to open the event record	Change the date and time information in the **When** and **To** fields and click **Submit**. The event appears on the calendar in the new lo cation.

Show or hide event types on the agent calendar

Users with the agent schedule user role can personalize their calendar and show or hide different types of events.

Before you begin

Role required: agent_schedule_user

Procedure

1. Navigate to your calendar.
   - **Customer Service** > **My Schedule**
   - **Field Service** > **Agent** > **My Schedule**
2. Click the configuration icon ( ) in the calendar header to display the Schedule Configuration menu.
3. Enable or disable the switches for the different types of events.
   An option is enabled when the switch is moved to the right and appears with a green background.

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4. Click the configuration icon ( ) again to hide the Schedule Configuration menu.
   The calendar displays the enabled task types.

Using Microsoft Outlook with CSM

Integrate Customer Service Management with Microsoft Outlook to perform tasks such as managing contacts and cases from within Microsoft Outlook.

Integrating Microsoft Outlook with ServiceNow® Customer Service Management (CSM) can significantly streamline communication and enhance the efficiency of customer service operations. This integration offers several key benefits.

- Facilitates seamless communication between agents and customers by synchronizing emails, calendars, and contacts. This ensures that important information is easily accessible, reducing the risk of missed messages or appointments.
- Enhances task management by allowing agents to create, assign, and monitor tasks directly from their Microsoft Outlook interface. This means that agents can manage their workloads more effectively without needing to switch between different platforms.
- Supports automated workflows, enabling agents to respond to customer inquiries quickly and accurately. It simplifies the process of updating customer records and logging service requests, thereby improving the accuracy and reliability of customer data.
- Improve collaboration among team members. Agents can share insights, discuss complex cases, and provide updates on customer issues effortlessly, fostering a more cohesive and responsive customer service environment.

View Microsoft Outlook customer contact details in your instance

Once you have integrated Customer Service Management (CSM) with Microsoft Outlook, you can view customer details in an Outlook add-in panel to make communication easier.

Before you begin

Role required: sn_customerservice.contact_manager, sn_csm_proxy_cont

Procedure

1. In Microsoft Outlook, open an email message you received from the contact.
2. On the Microsoft Outlook Home tab, click **View in ServiceNow**.
   The Outlook add-in panel displays the contact details.

   Note: If the contact details are not available, the `No contact was found` message is displayed.

3. **Optional:** If you want to perform other contact tasks, access the contact information in the CSM portal page by clicking the Pop-out icon ( ).

Create a contact in Microsoft Outlook

As an account manager, you can create a contact when you receive an email from a customer whose details aren't in the Microsoft Outlook contacts list.

Before you begin

Role required: sn_customerservice.contact_manager and sn_csm_proxy_cont

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Procedure

1. Open an email message that you received from the contact.
2. On the Microsoft Outlook Home tab, select **View in ServiceNow**.
   The contact details aren't available and the Outlook add-in panel displays the `No contact was found` message.
3. Select the more actions icon ( ) and select **Create Contact**.
4. Fill in the contact details in the case form and select **Submit**.
5. **Optional:** If you want to perform other contact tasks, access the CSM portal by selecting the Pop-out icon ( ).

View or modify existing cases in Microsoft Outlook

As an account manager, view the five most recent cases related to a Microsoft Outlook contact to understand contact-related issues, modify any case information, and communicate more efficiently with the contact.

Before you begin

Role required: sn_customerservice.contact_manager and sn_csm_proxy_cont

About this task

Although you can view or modify existing cases from Microsoft Outlook, you can also access the CSM portal to work on open cases by clicking the pop-out icon ( ).

Procedure

1. Open an email message you received from the contact.
2. On the Microsoft Outlook Home tab, click **View in ServiceNow**.
3. Click **Cases** in the Outlook add-in panel.
   The add-in panel lists the five most recent cases connected to the contact that are not closed. You can load more cases.
4. Click a case to open the case details.
5. Type your message.
6. **Optional:** If you have supporting information such as a message that you want to attach to a case, click the attachment icon ( ) and select the file.
7. Click **Send**.

Result

The newly added message is available in the activity stream.

Create a new case from an email message in Microsoft Outlook

If a customer whose contact details are available sends an email stating an issue, you can easily create a customer service case.

Before you begin

Role required: sn_customerservice.contact_manager and sn_csm_proxy_cont

Procedure

1. Open the email message you received from a customer.
2. On the Microsoft Outlook Home tab, click **View in ServiceNow**.

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The Outlook add-in panel opens in the right pane.

3. Click the more icon (···).
4. Select **Create Case** from the menu.
5. Fill in the case details on the case form.
6. Click **Submit**.

Mobile experience for CSM

Manage customer service cases from a mobile device with the Customer Service Management mobile application. Stay connected and access information in real time to complete tasks quickly.

Customer service agents and managers can use the Customer Service Management mobile application to review case details quickly and complete case tasks. Agents and customer service managers can perform routine actions and approvals effectively any time and anywhere.

Activate the Customer Service Mobile plugin (com.sn_csm_mobile) to use the available features. To use the change request feature, the Customer Service with Service Management (com.sn_cs_sm) plugin is required.

Note: The Customer Service Management mobile application supports product cases.

For more information, see Activate a plugin.

With the customer service agent role (sn_customerservice_agent), you can:

- Get a quick overview of your case load, including new cases, critical cases, and those that need attention.
- Accept and reassign cases.
- Add comments or work notes to cases.
- Review case details, activity stream, and related information such as SLAs, case tasks, and child cases.
- Edit case information such as priority.
- Propose major cases.
- Receive push notifications for assigned or updated cases.
- Search for cases using keywords

With the system administrator role, you can configure the Customer Service Management mobile application in the following ways:

- Configure pages to display the desired data.
- Configure the functions associated with swipe actions and top menu actions.
- Configure and create push notifications.

With the customer service manager role (sn_customerservice_manager) you can:

- Search for cases using keywords
- Review and approve change requests
- Approve escalations

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Activate the Customer Service Mobile plugin

The Customer Service Management mobile application runs on the ServiceNow® mobile platform.

To use the Customer Service Management mobile application, activate the Customer Service Mobile plugin (com.sn_csm_mobile). This plugin activates the following plugins:

- Mobile Agent Native Client plugin (com.glide.sg.agent_native_client)
- Case Management Core (com.sn_customerservice)
- Customer Service Case Action Status (com.sn.csm_action_status)

To provide support for major cases, you can activate the optional Major Issue Management plugin (com.sn_majorissue_mgt).

Once the Customer Service Management mobile application is activated and configured, agents can download the ServiceNow Agent mobile app on their mobile devices and access ServiceNow instances.

Note: You can activate the Customer Service Mobile plugin (com.sn_csm_mobile) from the Customer Service Management guided setup.

For more information, see Activate a plugin.

Related topics

Getting started with ServiceNow Agent

CSM application overview

Customer service agents and managers can use the applet launcher and applets in the Customer Service mobile application to view notifications and manage customer service cases.

Applet launchers

Applet launchers serve as landing pages or home pages. When you log in to your instance, you see an applet launcher and the applets configured to display on that launcher. The system administrator configures the applet launcher and applets for the Customer Service Management mobile application.

Navigation bar

The navigation bar appears at the bottom of the mobile application screen. This bar includes the following tabs that you can use to access different applets and application launch pages:

- **Cases**: displays the main case page. Use this applet launcher to access case management functionality.
- **Notifications**: view a list of the notifications that have been pushed to the agent. Tap a notification in the list to see the details, then tap the details open the case.
- **Settings**: manage settings for the mobile application.

Applets and cards

Select an applet from the applet launcher screen. Each applet contains one or more screens used to display records that correspond to the applet function. The Active Cases applet, for example, displays a list of all active case records.

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The cases in the list are displayed as cards, with the case status displayed at the top of the card. To use the cards:

- Swipe a card left or right to see the available actions, then tap the desired action.
- Tap a card to see the record details such as activity, related list, and escalations if any.
- In the detail view:
  - Tap the top menu to see additional actions, then tap the desired action.
  - Select the back button to return to the list.

Applets provide a filter option if there is more than one case in the list. When you tap the applet, you see a list of filters that you can use to narrow down the list of cases.

Agent applets

Customer service agents have access to the following set of applets.

Agent applets for My Cases

Applet	Description
My Cases	
Needs Attention Cases	Cases that are waiting for the agent to take action. Includes cases in the Open, Awaiting Info, and Resolved states.
Active Cases	Cases that are assigned to the agent. Includes cases Open, Awaiting Info, and Resolved states.
New Cases	Cases in the New state.
Active Critical Cases	Priority 1 cases in the Open, Awaiting Info, and Resolved states.

Note: Cases in these lists are sorted by the last updated date in descending order, with the most recent updated case displayed first.

Customer service card layout

In a list view, case cards display the following information:

- Case state
- Case number
- Short description
- Contact
- Account

In the major case list view, case cards display the following information:

- Major case state
- Case number
- Short description
- Account

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Case form related lists

Customer service agents can access the following Case form related lists.

Related lists and their descriptions for Case form

Related list	Description
SLAs	Displays a list of SLAs for a case. View the following information for SLAs included in this list: • Task • SLA Stage • SLA Definition • Actual Elapsed Percentage • Actual Elapsed Time **Note:** Detail view is not available from the SLA related list.
Tasks	Displays a list of case tasks. View the following information for case tasks included in this list: • State • Number • Subject • Assigned to • Priority **Note:** Detail view is not available from the Tasks related list.
Child Cases	Displays a list of child cases for a case. View the following information for child cases included in this list: • Case number • State • Short description • Account • Contact Click a child case to view additional details on the Case form.

Notifications

Agents can receive notifications in the Customer Service mobile application when cases are assigned, are commented, or need attention. The following table lists the available notifications:

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Notifications in the Customer Service mobile application

Notification	Description
Case assignment	When a case is assigned to an agent by someone else, a notification is sent to the agent selected in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Case comments	When information is added to a case in the **Additional comments** or **Work notes** fields by someone other than the assigned agent, a notification is sent to the user selected in the **Assigned to** field. The notification includes the case number, priority, and short description.
Needs attention flag is checked	When the **Needs attention** flag is checked on the Case form, a notification is sent to the agent in the **Assigned to** field. The notification includes the case number, state, priority, and short description.
Case escalation	When an escalation is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.
Change requests	When a change request is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.

Related topics

Applet launcher

Navigation bar

Mobile push notifications

Get started with the Customer Service mobile application

Use the ServiceNow Agent mobile app to access the Customer Service mobile application. Then log in to an instance as an agent or manager and work on your customer service cases.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

Procedure

1. Depending on your device, go to the Apple App Store or the Google Play Store and download the ServiceNow Agent mobile app.
2. Log in to an instance.
3. Tap **Customer Service** to open the application and display the applet launcher.

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4. Manage your customer service cases based on your role.
   For more information about the agent and manager tasks, see Use mobile application to perform agent and manager tasks.

Related topics

Agent mobile app

Use mobile application to perform agent and manager tasks

Customer service agents manage cases and real-time notifications help in taking immediate action. Customer service managers can approve escalations and perform tasks on major issues with a swipe.

Agents (sn_customerservice_agent) and customer service managers (sn_customerservice_manager) can perform routine actions and approvals effectively anytime and anywhere.

Agent tasks

Agent tasks	Action	Description
Accept a case	Swipe left and tap **Accept**.	Accept a case that has been assigned to you.
Add comments to a case	• Swipe right and tap **Add Comments**. • Tap the top menu and select **Add Comments**.	Add information to the case **Work Notes** or **Additional Comments** fields.
Assign a case to another agent	• Swipe left and tap **Assign**. • Tap the top menu and select **Assign**.	This action is available for unassigned cases. Select to display the **Assignment Group** and **Assigned To** fields and make the assignments.
Assign a case to yourself	• Swipe left and tap **Assign to me**. • Tap the top menu and select **Assign to me**.	Assign an unassigned case to yourself.
Close a case	Tap the top menu and select **Close Case**.	Select to display the **Resolution Code** and **Resolution Notes** fields, which are mandatory fields for completing this action. Enable the check box to add the resolution code to the **Additional Comments** field.
Edit a case	Tap the top menu and select **Edit Case**.	You can edit the following fields in the Case form: • Short description • Account

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Agent tasks (continued)

Agent tasks	Action	Description
		• Contact • Needs attention • Priority • Product • Asset • Assignment group: selecting an assignment group clears the value in the **Assigned to** field. • Assigned to: if a group is selected in the **Assignment group** field, the list of available users belong to that group.
Open a case	Tap the top menu and select **Open Case**.	Open a case and change the state from **Awaiting info** or **Resolved** to **Open**.
Propose a case as a major case	Tap the top menu and select **Propose Major Case**.	Propose a case as a major case candidate. **Note:** This action is available if the Major Issue Management plugin is activated.
Propose a solution for a case	Tap the top menu and select **Propose Solution**.	Select to display the **Resolution Code** and **Resolution Notes** fields, which are mandatory fields for completing this action. Enable the check box to add the resolution code to the **Additional Comments** field.
Reassign a case to another agent	Swipe left and tap **Reassign**.	Available for assigned cases. Select to display the **Assignment Group** and **Assigned To** fields and change the assignments.
Request more information	• Swipe left and tap **Request Info**. • Tap the top menu and select **Request Info**.	Add the request to the **Additional Comments** field.

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Agent tasks (continued)

Agent tasks	Action	Description
Search for a case using keywords (role: sn_customerservice_agent or sn_customerservice_manager	Enter search keyword in the search bar.	All cases except those in "Closed" state are listed. From the top menu, you can request for information, escalate a case, propose a solution and so on.
Escalate a case (role: sn_customerservice_agent or sn_customerservice.escalation_requester)	Tap the top menu and select **Escalate Case** and fill in the required information.	Enter the following information and click **Submit**. • **Request Source** • **Reason** • **Escalation Severity** • **Escalation Template** • **Escalation Justification**
View escalation	Click **Escalations** tab.	You can view details of the escalation such as escalation justification and the requester's name.
View change request (role: sn_customerservice_agent and sn_change_read)	Click on **Change Request** field on the case form.	The Change Request form view displays details about the schedule, planning, conflicts, and details of the change activity.

Manager tasks

Manager tasks	Action	Description
Approve escalations (role: approver_user) **Note:** Agents with the approver_user role can also approve escalations and change requests.	• Navigate to **My Approvals** >**Escalations**. • Tap the top menu or swipe left. • Click **Reject** or **Approve**.	• Pending approvals are displayed based on the oldest request. • Click the **Approved** tab to check the escalation you approved. **Note:** When an escalation is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.

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Manager tasks (continued)

Manager tasks	Action	Description
Review and approve change requests (role: approver_user) **Note:** Agents with the approver_user role can also approve escalations and change requests.	• Navigate to **My Approvals>Change Requests** on the case form. • **Approve** or **Reject** the change request that is in Assess state on the Change Requests form.	A change request requires team members or a manager to assess the change request. They evaluate the request and approve or reject. **Note:** When a change request is raised, users who are part of the group that has permissions to approve are notified. The approvers review and approve them.

Install base work plans

You can create an install base work plan on the Customer Service Management application to get the details that are related to an install base item. Work plans help you to create, maintain, and view the basic details of an install base item. You can also plan for the regular and timely maintenance of the install base item.

Overview

A work plan provides the information that you need about the regular maintenance that you must do for an install base item. You can create a work plan for a product model. All the install base items that are associated to that product model inherit the same work plan.

You assign your customer and consumer service agents with the sn_fsm_planned_wm.planned_work_read role so that they can have read access to all the planned work management tables.

You can also create a work plan in the CRM Workspace. To create a work plan in the workspace, see Create a work plan in Customer Service Management (CSM) Configurable Workspace.

Related lists for work plans

You can perform or view the maintenance operations, like device inspection and performance, for an install base item through the related lists section of the Install Base form. The following table lists the descriptions about the related lists for the work plans.

Work plans related list

Related list	Description
Work plans	Manage the maintenance requirements of an install base item. They include information on how often maintenance must be performed, what the maintenance activities are for the install base, and the order in which they must be performed. To create a work plan, see Create a work plan with Customer Service Management (CSM).

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Work plans related list (continued)

Related list	Description
Planned Work Schedules	Gauge the timing and regularity of implementation of a schedule for a work plan. Planned work schedules have triggers like the duration, meter, condition, and script to determine and ensure that the work plan milestones are met. To create a planned work schedule, see Configure a work schedule.
Planned Work Schedule Templates	Describe the planned maintenance activities that must be performed for an install base item and the order in which they must occur. To create a planned work schedule template, see Associate a work order template to a work schedule.
Work Orders	Create work orders for field service agents to perform scheduled maintenance activities for the install base item. To create a work order, see Create a work order. Select the related list from the install base form to create a work order for an install base item. Select the Work order related list from the planned work schedule form to create a work order for a work plan.
Work Order Tasks	Work orders and work order tasks are related and created only if there's an existing work order for the install base item. Fill in the **Parent** field on the work order task form with the name of the work order. To create a work order task, see Create a work order task.

Create a work plan with Customer Service Management (CSM)

Create a work plan so that you can plan and delegate field service agents to fulfill the planned maintenance operations for an install base item on the Customer Service Management (CSM) (CSM) application and CSM Configurable Workspace.

Before you begin

Role required: sn_fsm_planned_wm.planned_work_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install base item**.
2. Open an install base item.
3. Open the Work Plans related list and select **New**.
4. On the form, fill in the fields.

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Work plan form on the Customer Service application

Field	Description
Name	Name of the work plan.
Type	Type of trigger that determines when work should be performed: ○ **Model based:** Base the work plan on a specified model of a configuration item (CI). ○ **General:** Base the work plan on a table and filter. ○ **Install base:** Base the work plan on specified models of the install base items. **Note:** ○ Model-based plans apply only to hardware models, specifically ones that have at least one model category defined. ○ The install base plan type is available only if the Customer Service Install Base Management (com.snc.install_base) plugin is activated.
Model	One or more product catalog items that you can select to identify the configuration items (CIs) or install base that requires maintenance. When you select a model, the associated table appears in the **Table** field. For example, if you select a specific PC model, the **Table** field displays **Computer [cmdb_ci_computer]**. This field appears if you selected either **Model based** or **Install base** type. For Install base type, the **Table** field automatically fills in an appropriate table that is based on the selected model.

5. Right-click the form and select **Save**.

Result

A draft of the work plan is created. Next, you can create a planned work schedule to make the work plan active and ready for an agent. To configure a planned work schedule, see Configure a work schedule.

Create a work order

Create a work order to manage your regular maintenance and service requirements for an install base item. You can do this task by using the Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

A work order is a request for off-site work. You can create a work order for a new or an existing work plan so that you can assign work order tasks to field service agents. Users with the sn_customerservice_agent and sn_customerservice.consumer_agent roles can create the work orders and provide the information that is needed for the fulfillment of the work order tasks. If the scope of an existing work order changes during the planned maintenance stage, you can create a work order for an existing work order.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install base item**.
2. Select an install base item record.
3. From the related list, select **Work Orders** and then select **New**.
4. On the Work Order form, enter the short description.

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Note: The **Install base item** field is automatically filled in because the work order is created directly through the install base form.

5. Select **Submit**.

   A work order for the install base item is created and appears in the Work Order related list on the install base form.

   All work orders that are associated with a child install base item also appear in the work orders section of the parent install base form.

Automate and optimize

Enhance the efficiency and effectiveness of your ServiceNow® Customer Service Management platform with automated workflows, AI-powered chatbots, predictive analytics, and data analytics and reporting.

Automation and optimization applications

Topic	Description
Using Virtual Agent in Customer and Consumer Service Portals	The ServiceNow Virtual Agent platform offers user assistance through an intelligent messaging interface that helps you to deliver conversational support when integrated into your Customer and Consumer Service Portals.
Using Proactive Customer Service Operations	Monitor your customers' products and services to identify issues proactively, inform the affected customers, and fix issues quickly.
Task Intelligence	Use the Task Intelligence features to create field prediction and sentiment models, review and submit values extracted by Document Intelligence, and review task intelligence analytics and prediction history.
Guided Decisions	• Use Guided Decisions in playbooks to resolve cases- As an agent, work your way through a decision tree in a playbook to help troubleshoot a case and get recommendations on the next possible steps in solving the case. • Use Guided Decisions in recommended actions to resolve cases- As an agent, work your way through a recommended action of type decision tree to help troubleshoot a case and get recommendations on the next possible steps in solving the case.
Recommended Actions for Service	Using the Recommended Actions application- Through the Recommended Actions application, use the recommended actions of type guidance and guided decision

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Automation and optimization applications (continued)

Topic	Description
	tree in your workspace to resolve cases quickly. Use the field recommendation to get recommendations on the field values. Use the AI search option to search the relevant resources from various sources.
Playbooks for Customer Service Management	Using Playbooks for Customer Service Management- • Customer service agents can use playbooks to complete the tasks and activities that are needed to resolve specific types of cases. • Playbooks provide step-by-step guidance through the lifecycle of a customer service case. • Playbooks include multiple stages and each stage includes one or more activities for an agent to complete.

Using Virtual Agent in Customer and Consumer Service Portals

The ServiceNow Virtual Agent platform offers user assistance through an intelligent messaging interface that helps you to deliver conversational support when integrated into your Customer and Consumer Service Portals.

Integration of Virtual Agent

Virtual Agent is a conversational bot platform that uses a messaging interface to provide user assistance. When integrated with your portal, it helps automate customer interactions and streamline tasks on your Customer and Consumer Service Portals. It builds automated conversations with a base system that helps your users quickly obtain information, make decisions, and perform common work tasks with Virtual Agent.

With Virtual Agent, you can offer continuous support, improve response times, and ease the workload on your customer service team.

Activation

Virtual Agent activates automatically when you enable it for Customer Service Management (CSM). Once activated, by default it integrates seamlessly with your CSM and CSP portals. For more information, see Activate Virtual Agent for Customer Service Management.

ServiceNow Otto in Virtual Agent in self-service portal

Integrate the ServiceNow Otto in Virtual Agent in Virtual Agent with Customer and Consumer Service Portals to enable generative AI skills in your conversational experiences. It helps create a natural-language conversational experience that can improve the success of your self-service workflows.

ServiceNow Otto benefits in self service Portals

The key benefits of adopting ServiceNow Otto in Virtual Agent for your portals include:

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- Conversational responses: ServiceNow Otto in Virtual Agent uses large language models (LLMs) to deliver natural-language responses, making interactions more human-like and improving user satisfaction.
- Improved self-service: It helps improve productivity and efficiency by providing faster answers and recommended actions.
- Enhanced search: Enhances search capabilities by guiding users through more refined, AI-driven searches, helping them locate the information they need with greater accuracy and efficiency. Users can also search for public content in the ServiceNow Otto in Virtual Agent and get the search results. The source of the search results are available as internal or external with the links to it.

Getting started with ServiceNow Otto in Virtual Agent in Customer and Consumer Service portals

Use the following steps to get started with ServiceNow Otto in Virtual Agent in Customer and Consumer Service portals.

- To enable ServiceNow Otto in Virtual Agent in your portals, verify that the experience is configured by the virtual_agent_admin or admin role. For more information, see Assistants overview.
- In the **Display experience** tab, select **Customer Service for Customer Service Portal** or **Customer Support for Consumer Service Portal** from the **Portals** tab, then select the Chat widget.
- In the **Information Sources** tab, control the information available to the assistant. Select **Copy existing configuration** and select the search profile: CSM Portal Default Search Application for CSM, or CSP Portal Default Search Application for CSP.

  Note: Each assistant has its own search configuration. If the assistant appears on a portal or mobile app that already has AI search configured, copy that configuration to maintain consistency.

Related topics

ServiceNow Otto conversational experience in self-service portals

Using Virtual Agent in Customer and Consumer Service Portals

Assistants overview

Using Now Assist in portal case form

Guide requesters through a self-service flow to find solutions to their problems using Genius Results and reduce the number of cases created.

A guided flow enhances the user experience by assisting requester who is facing issues and are about to create a case. It helps them find solutions through genius results, thus reducing the number of cases created and the effort required by agents to close open cases.

- As a requester, you can enter your details and receive the results as part of your case creation process.
- As a requester, you can continue with the case creation even if the results don't load and create a case.
- As a requester, you can see the results on the same page until you submit the form or cancel the flow.

Note: This record producer is available for the Customer Support portal (CSM).

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Guided Flow for Case Creation

1. Enter Your Details:
   - Navigate to **Request Something** > **Support** > **Create case for a product (*Now Assist*)**.

     Note: Verify that AI search in portals is activated. For more info, see Enable and configure AI Search in Service Portal

   - A single Subject field appears. Start entering your issue, and genius results, sources, related catalog items, and knowledge articles are displayed under related content.

     Note: You can also search for public content in the portal and get the search results from within the *Now Assist* genius result. The source of the search results is available as internal or external with the links to it.

2. Review Results:
   - If no genius results are found, related content is shown.
   - If no results are found, a message appears: There's not enough description for AI to find the results. Try using different keywords or another sentence.

   Note: Genius result configuration: The behavior of Now Assist results depends on the selected genius result configuration.

   - When configured for Now Assist Q&A, the system generates a direct answer based on your query and displays relevant sources below the response.
   - When configured for multi-content response, the system follows the same response flow as Q&A and includes additional features for displaying multiple content types in a single result.
     - Response text includes the inline citations that correspond directly to the sources listed in the **Sources** section. The citations appear as numbered references — for example, [1] and [2] — and map to sources in the order they appear in the list. You can select a source to view the referenced content.
     - You can access the Virtual Agent chat interface by selecting the chat icon under **Sources**. The Virtual Agent provides contextual follow-up questions to help resolve requests. Ensure that **Now Assist Actions** genius result configuration is setup to see this.

3. Take Action:
   - If you find a solution to your query, select the **Cancel** button to return to the home page.
   - If no results are found or you're not satisfied with the result, select the **Ask** *Now Assist* button, to open a contextual chat window in the Now Assist in Virtual Agent for additional help.

     Note:

     Enable enhanced chat experience from the Now Assist in Virtual Agent guided setup for the feature to work. For details, see Display your assistant on a portal, channel, or mobile app.

   - If no relevant results are found, select **Continue with case creation** to proceed. This action enables the **Submit** button and shows the additional fields needed to complete the case form.
   - Select **Submit** to create a record case.

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This guided flow helps you find solutions faster, improves the user experience, and reduces case creation and agent effort.

Update the service portal chat configuration

Configure the Now Assist in Virtual Agent chat configuration to ensure Now Assist in Virtual Agent loads on your Customer and Consumer Service Portals when CSM chat is enabled.

Before you begin

Role required: workspace_admin

Procedure

1. Navigate to **All** > **Service Portal** > **Agent Chat**.
2. To configure Now Assist in Virtual Agent loading on your Customer Service Portal:
   a. On the Service Portal Agent Chat Configuration page, select **Now Assist in Virtual Agent - CSM Chat Config** in the **Name** column.
   b. On the form, enter a value in the **Order** field.

      Note: To display Now Assist in Virtual Agent chat configuration prominently on the portals, set the **Order** value to be either lower or better compared to the old CSM chat configuration.

   c. In the script box, replace the current script with the following script.

```
(function($sp) {
 var configObj = {portal: $sp.getValue('url_suffix')},
  isVAActive =
 GlidePluginManager.isActive('com.glide.cs.chatbot');

 configObj.liveagent_application = 'csm';
 configObj.live_agent_only = !isVAActive;
 configObj.liveagent_queue =
 $sp.getDisplayValue('sp_chat_queue');

 var cc = new GlideRecord('customer_contact');
 cc.addQuery('sys_id', gs.getUserID());
 cc.query();
 if (cc.next()) {
  configObj.liveagent_interaction_contact =
 cc.getUniqueValue();
  configObj.liveagent_interaction_account =
 cc.getValue('account');
 }

 if (gs.isLoggedIn() &&
 GlidePluginManager.isActive('com.sn_csm_b2b_consumers')) {
  var consumer = new GlideRecord('csm_consumer');
  consumer.addQuery('user', gs.getUserID());
  consumer.query();
  if (consumer.next()) {
   var accounts = new
 sn_acct_consumer.AccountConsumerUtil().getAccountFromConsume
r(consumer.getUniqueValue());
   if (accounts.length > 0) {
```

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```
    if (accounts.length == 1) {
     configObj.liveagent_interaction_account = accounts[0];
    }
    configObj.liveAgent_interaction_consumer =
 consumer.getUniqueValue();
   }
  }
 }

 return configObj;
})($sp);
```

d. Select **Update**.

3. To configure Now Assist in Virtual Agent on your Consumer Service Portal:

a. On the Service Portal Agent Chat Configuration page, select **Now Assist in Virtual Agent - CSP Chat Config** in the **Name** column.

b. On the form, enter a value in the **Order** field.

> **Note:** To display Now Assist in Virtual Agent chat configuration prominently on the portals, set the **Order** value to be either lower or better compared to the old CSM chat configuration.

c. In the script box, replace the current script with the following script.

```
(function($sp) {
 var configObj = {portal: $sp.getValue('url_suffix')},
  isVAActive =
 GlidePluginManager.isActive('com.glide.cs.chatbot');

 configObj.liveagent_application = 'csm';
 configObj.live_agent_only = !isVAActive;
 configObj.liveagent_queue =
 $sp.getDisplayValue('sp_chat_queue');

 if (gs.isLoggedIn()) {
  var consumer = new GlideRecord('csm_consumer');
  consumer.addQuery('user', gs.getUserID());
  consumer.query();
  if (consumer.next()) {
   configObj.liveAgent_interaction_consumer =
 consumer.getUniqueValue();
  }
 }

 return configObj;
})($sp);
```

d. Select **Update**.

Result

Now Assist in Virtual Agent configuration takes precedence over the standard Virtual Agent chat configuration for the portal.

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ServiceNow Otto conversational experience in self-service portals

Learn about the ServiceNow Otto enhanced chat feature in the Self-service portals.

ServiceNow Otto enhanced chat is a conversational support experience within a dynamic window that also includes the ability to have multiple active conversations and superior search capabilities.

You can enable enhanced chat experience from the ServiceNow Otto in Virtual Agent guided setup. For details, see Display your assistant on a portal, channel, or mobile app.

Enhanced chat experience on self-service portal

Refined portal header

Dynamically displays content based on the assigned taxonomy tags.

Effortless navigation

Easily navigate to topics and their subcategories in one place, providing a seamless navigation experience.

Multiple chats

Engage in multiple chat conversations instead of the existing single active conversations in the Virtual Agent.

Redefined theme

The new theme is visually appealing, engaging, and user-friendly, with a focus on enhancing productivity.

Search experience

When you search for information using the Now Assist enhanced chat on your self-service portals, you receive comprehensive and detailed answers compared to the traditional AI search.

Unlike the traditional AI search page, the Now Assist enhanced chat helps you find the information you need and combines them into a synthesized comprehensive answer. It searches information from KB articles, external content, Virtual Agent topics, catalog items, and people citations.

The search results include links to the sources of information and related actions. When you select the citation, different information is displayed depending on the type of source.

Related topics

ServiceNow Otto in Virtual Agent in self-service portal

Using Virtual Agent in Customer and Consumer Service Portals

Using Proactive Customer Service Operations

Monitor your customers' products and services to identify issues proactively, inform the affected customers, and fix issues quickly.

There are various different roles required for Proactive Customer Service Operations based on the tasks you perform.

Some tasks only apply if you are using Event Management integration on CSM Agent Workspace or the ServiceNow AI Platform interface. This is noted at the top of each task.

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Roles required

Role	Tasks
evt_mgmt_admin, evt_mgmt_operator **Note:** These roles only apply if you are using the integration with Event Management.	Create alerts and proactive cases from alerts.
sn_customerservice_agent	Propose proactive cases as major case candidates, work on, and close proactive cases.
sn_customerservice_manager	Review and accept a proactive case as a major case and create child cases. Associate outages to cases or create an outage for a case. Track Key Performance Indicators (KPIs) to understand how proactive the team was in identifying and communicating issues that impact customers. For more information, see Proactive Customer Service - Advanced dashboard.
sn_majorissue_mgt.major_issue_manager	Create proactive cases. Review and accept proactive cases as major cases and create child cases. Associate outages to cases or create an outage for a case.

Related topics

View the install base in CRM Workspace

View install base information from the Customer Service Portal

Create a case for install base from the Customer Service homepage

View sold product information in CRM Workspace

Create a proactive case from an alert

Create a case for customer install base affected by an alert to anticipate customer issues and address them proactively.

Before you begin

Role required: evt_mgmt_admin, evt_mgmt_operator

About this task

Note: This task only applies if you are using Event Management integration on CSM Agent Workspace or the ServiceNow AI Platform interface.

A proactive case is a case created on behalf of customers, whose install base is directly affected by an alert. You can open a proactive case manually or through automation. Customer service agents then work on cases. From the Alert form, you can also track the install base items affected by the alert.

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If the **Create Proactive Case** rule is enabled, a case is automatically created when an incident is created from an alert and the system has determined that there are external customer install base items affected. For more information, see Activate an alert rule to automatically create a proactive case from an alert.

ITOM Event Management calculates the services (CIs) impacted by an alert and populates the em_impacted_ci_table with the impacted services (CIs) and alert CI on the given alert.

The Affected Install Base related list on the Alert form displays the install base items that are linked to the impacted services (CIs).

The **Refresh Affected Install Base Items** button on the Alert form recalculates the impacted services (CIs) and updates the em_impacted_ci_table and affected install base items with the latest changes. For more details, see Alert Impact Calculation.

Procedure

1. Navigate to **All** > **Agent Workspace** > **Agent Workspace Home** > **Lists** > **All Alerts**.
2. Click an alert that you want to create a case for.
3. To trace the install base items affected by the alert, click **Refresh Affected Install Base Items**. These items are listed in the Affected Install Base Items related list on the Alert form. The **Affected Install Base Items** list is not updated automatically, so refresh the install base items each time you open an alert.
4. Click **Create Case**.

   Note: If you don't see the **Create Case** option, click **...**.

5. Fill out the **Short Description** and other fields, as required.
6. Click **Submit**.
   A proactive case is created and the case number is added to the **Case** field on the Alert form.

   Case priority is set based on the severity of the alert. Customer service agents can then take action accordingly.

Case priority based on alert severity

Alert severity	Case priority
Critical	Critical
Major	High
Minor	Moderate
Warning	Low
Info	Low

Manage a proactive case created from an alert

Work on a proactive case and resolve the proactive case as you would other customer service cases.

Before you begin

Role required:

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- sn_customerservice_agent
- evt_mgmt_admin and evt_mgmt_operator have read-only access to a case created from an alert and can add work notes, as required.

About this task

Note: This task only applies if you are using Event Management integration on CSM Agent Workspace or the ServiceNow AI Platform interface.

Review proactive cases created from alerts using Agent Workspace. Identify customers, their corresponding install base items affected by the issue causing the alert as well as the service health for each affected install base item. Depending on the number of customers affected, you can propose a proactive case as a major case.

Procedure

1. Navigate to **All** > **Agent Workspace** > **Agent Workspace Home** > **Lists** > **Cases**. Alternatively, accept a proactive case from your Agent Workspace inbox.
2. Click the case you want to work on.
3. You can perform the following actions from the Case form.

Case form

Action	Description
Click **Refresh Install Base Health**.	Update the health status of the affected install base items to see the real-time service status of the account's install base items. **Note:** To see this UI action, there must be an account assigned to the case and at least one install base item attached to the case or account.
Click **Affected Install Base Items**.	View accounts and their corresponding install base items affected by the alert. If you don't see this option, click **more**.
Click **Add** or **Remove**.	Add or remove an affected install base item.
Click **Details**.	View the sold product associated to the case as well as the alert that the case was created from.
Click **Propose Major Case**.	Propose a major case when multiple customers are affected. **Note:** If you don't see this option, click the More UI Actions icon (···).

4. Resolve and close proactive cases in the same way as other customer service management cases.

   Note: If an alert is closed, a case is not automatically closed.

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Related topics

Propose a case as a major case candidate

Close a customer service case

AWA for CSM

Review and accept a proactive case as a major case

Review and accept proactive cases as major cases using the major issue management process.

Before you begin

Role required: sn_majorissue_mgt.major_issue_manager or sn_customerservice_manager

Procedure

1. Open your workspace.
2. Navigate to **Major Issue Management** > **Candidates**.
3. **Optional:** Click **Major Case Information** > **Affected Customers** to view the automatically generated list of customers affected by the issue.
4. **Optional:** Click **Create Child Cases** to create a child case for each affected customer.
5. Accept or reject the proactive case as a major case.
6. Follow the major issue management process to resolve the proactive case.

Note: If the Proactive Customer Service Operations with Event Management plugin is activated, your system administrator may have configured workflows to automate the creation of major cases depending on the number of accounts affected by an issue. If your system administrator has configured workflows, major cases are created in either **Accepted**, **Proposed**, or **Created** state depending on the settings. If **Accepted**, child cases are automatically created.

Related topics

Major issue management overview

Create a major case

Create a major case candidate

Approve or reject a major case candidate

Create child cases for a major case

Track the service health of install base items in Agent Workspace

Track the operational status of install base items belonging to an account, to better correlate customer issues and provide faster responses.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

The service health status provides you with visibility into the service health of a customer's install base items. The service health status is based on the severity of the impacted services being monitored at the Network Operations Center. Refresh the service health status on the Account and Case forms to access the real-time health status of install base items.
As a customer service agent, you can view the service health status of install base items in a case or a customer account.

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Procedure

1. Open your workspace.
2. Navigate to **Lists**.
3. Click an account or a case.
4. To refresh the health status of install base items on both the Account and Case form, click **Refresh Install Base Health**.
5. To view the health status of an install base item on the Account form, click the **Install Base Items** related list.
6. To view the health status of an affected install base item on the Case form, click the **Affected Install Base Items** related list.

Related topics

Service health status for install base

Associate an outage to a major case

Associate an outage with a major case to keep customers informed about any issues affecting their install base items.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

About this task

If there are any existing outages for services (CIs) on install base items related to the case, a message is displayed at the top of the screen. Review the outages and add them to the case to expose the information to customers and keep them up to date on any issues that might affect their install base items.

Procedure

1. Open your workspace.
2. Navigate to **Major Issue Management** > **All**.
3. Select the major case that you want to add outages to.
4. On the **Outages** related list, select **Edit**.
   A filter displays the outages. Only those outages related to at least one of the services (CIs) for the install base items in the case is displayed. In this case, a CI is typically a service being used by the customer.
5. Add the outages that you want to associate with the case.
6. Select **Save**.
   - The outage is associated with the case and the work notes are updated accordingly.
   - Customer service agents can view the outages for a case in the Outages related list.

Create an outage from a major case

Create an outage from a major case to keep customers informed about any issues affecting their install base items.

Before you begin

Role required: sn_customerservice_manager, sn_majorissue_mgt.major_issue_manager

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About this task

If no outages exist, you can also create outages directly from a major case to inform affected customers.

Procedure

1. Open your workspace.
2. Navigate to **Major Issue Management**.
3. Create a major case or select an existing major case with no outages associated with it.
4. Select **Create Outage**.

   Note: You can only create an outage from a case if there are no outages already associated with it and there is at least one affected install base item associated with the case. You can't create an outage on a child case.

5. Fill out the fields on the Outage form, as required.
6. Select **Submit**.
   All services (CIs) associated with the install base items in the case are associated with the outage as **Affected CIs**.

Track outages for install base items

View outages associated to a case to keep customers informed about any issues affecting their install base.

Before you begin

Role required: sn_customerservice_agent

About this task

Outages can be tracked using both proactive cases and customer-reported cases.

Procedure

1. Open your workspace.
2. Click **Lists**.
3. Click a proactive case.
4. Click the Outages related list to view all outage information related to the case.

   Note: If the Outages related list isn't displayed, click **more**.

Using Proactive Customer Service Operations for business organizations

Track install base service health, track outages, and view outage banners for install base items at a business organization.

The proactive customer service and major case management has been extended to business organizations, alongside the existing support for accounts. Digital services used by businesses organizations, referred as Install Base Items, are supported as affected install base items.

The following tasks work the same way for business organizations as they do for accounts:

- Create a proactive case from an alert
- Manage a proactive case created from an alert

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- Review and accept a proactive case as a major case
- Create an outage from a major case

When multiple business organizations are affected by the same issue, the system can propose a major case and build a recipients list of the affected business organizations. If the major case manager accepts the proposal, they can create child cases for each affected business organization, so every affected business organization is tracked and updated under a single major case. For more information on major cases, recipients lists, and child cases, see Major issue management overview.

Note: When using proactive customer service with business organizations, keep the install base items for business organizations separate from the install base items for accounts. In other words, don't use a single configuration item for both accounts and business organizations. For more information on how to configure proactive case flows for business organizations, see Configure proactive case flows for business organizations.

Track outages for a business organization's install base items

View outages associated with a case to keep business organizations informed about any issues affecting their install base.

Role required: sn_customerservice_agent

Outages can be tracked using both proactive cases and customer-reported cases.

1. Navigate to **All** > **Customer Service** > **Cases** > **Proactive active**.
2. Open the proactive case related to business organization's install base item.
3. Open the Outages related list. You can view and track the outages from here.

Related topics

Using Proactive Customer Service Operations

Track outages and install base service health on BOSP

Use Task Intelligence for Customer Service

Use the Task Intelligence features to create field prediction and sentiment models, review and submit values extracted by Document Intelligence, and review task intelligence analytics and prediction history.

Use the Task Intelligence Admin Console to create models and Document Intelligence use cases:

- Create a model to predict record fields
- Create a model to predict case sentiment
- Create a model to detect case language
- Create a Document Intelligence use case

You can also use Task Intelligence features to complete the following tasks:

- Review and submit values predicted by Document Intelligence
- View Task Intelligence Analytics
- View Task Intelligence prediction history

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Related information

For more information about Task Intelligence for Customer Service, see the following topics:

- Task Intelligence for Customer Service
- Configure Task Intelligence for Customer Service

Review and submit values predicted by Document Intelligence

Agents can extract, validate, and update the key values from valid attachments in the case using the Document Intelligence interface.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_csm_ml_task.ti_admin

About this task

The task definition includes an extraction mode that determines how the system handles the extracted values: straight through processing, auto-fill, or recommendations. Regardless of the extraction mode, agents can view valid attachments in the Document Intelligence interface and confirm or correct the values.

Procedure

1. Open a case in CSM Configurable Workspace.
2. Select **Review in DocIntel** to open the Document Intelligence workspace in a separate tab and view the attachments and extracted values.
   In this tab:
   - Attachments appear in the list of attachments on the left side of the tab.
   - An image of the selected attachment appears in the center of the tab.
   - Extracted fields appear in a list on the right side of the tab.
3. Select an attachment to view an image of that attachment in the center of the tab.
4. Review the extracted fields and confirm or correct the values.
   a. If a value for a field is correct, select in the field and press Enter to confirm.
      Confirmed values have a blue check mark.
   b. If a value for a field isn't correct, select in the field, select the correct value from the drop-down list, and press Enter.
   c. If the correct value doesn't appear in the drop-down list, select the more actions button and select **Missing in this document**.
5. Select **Submit** to add these values to the fields on the Case form.

View Task Intelligence Analytics

View the Task Intelligence for CSM Analytics dashboard to monitor the model performance over time, track the business value, and see what predictions your agents did or didn't use.

The dashboard uses visual representations to provide you with an overview of how each model is performing. You can see the number of predictions from each model and the overall mean time that it takes to resolve the cases in your organization.

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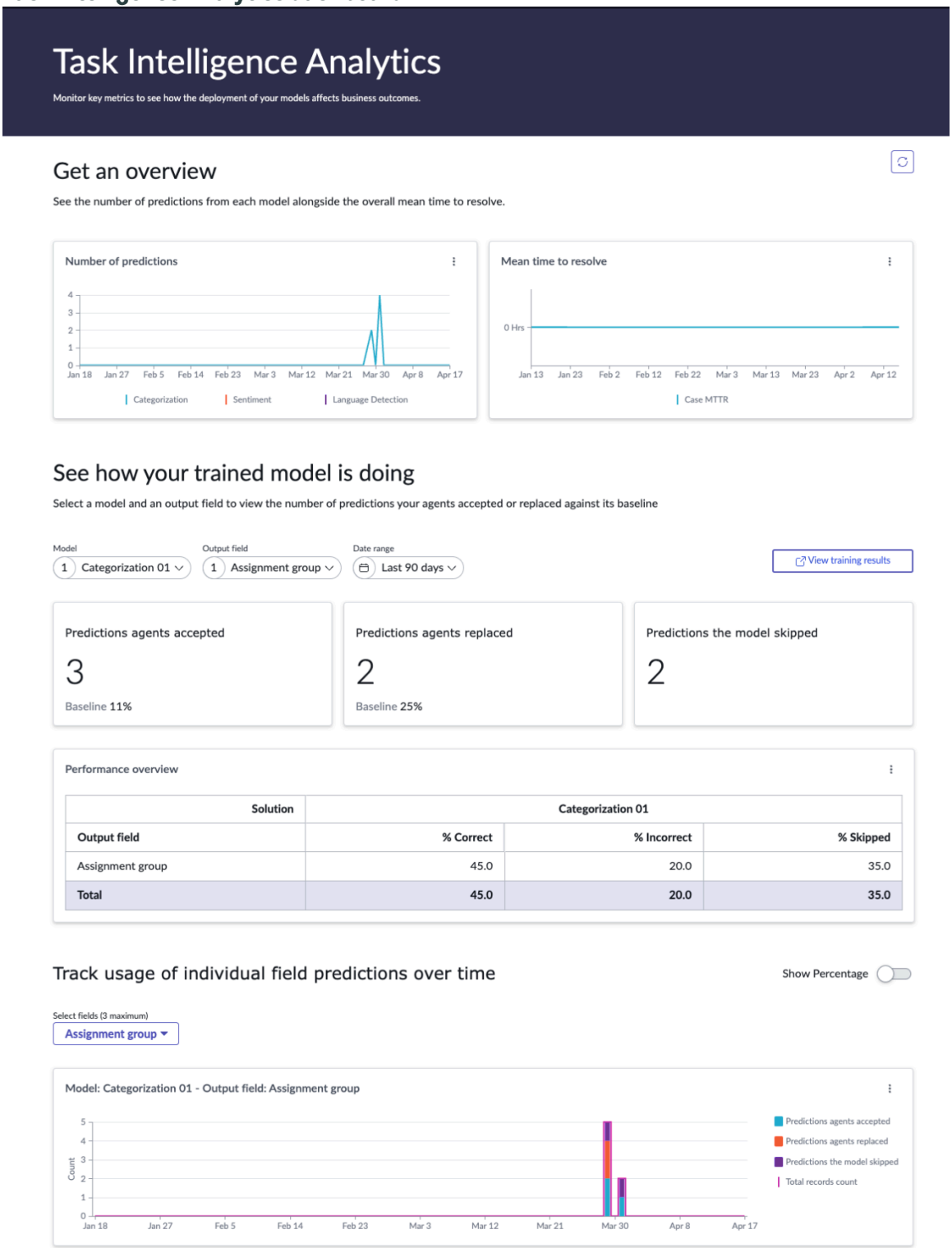
The following example shows the Get an overview and See how your trained model is doing sections within the dashboard.

Task Intelligence Analytics dashboard



Get an overview

The dashboard contains visual representations that provide you with the business value of the model.

Number of predictions

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The line graph shows the number of correct predictions that agents have accepted over time for all the categorization models combined. If the sentiment and language models are activated, the correct predictions for those models are shown as well. As the model continues to learn, it can increase the number of predictions that agents accept.

Mean time to resolve (MTTR)

The line graph shows the average amount of time that it takes to resolve cases over time. As the model makes more predictions, the MTTR should decrease as the predictions help your agents.

The Task Intelligence Analytics page includes the following data about the predicted fields and how they impact your business:

- The number of predicted fields.
- The number of predictions that agents used.
- The number of predictions that agents changed.

See how your trained model is doing

The dashboard uses visual representations to help you monitor the utilization of predictions by the model over time. By selecting a specific model and output field, you can view the number of predictions that were accepted or replaced by the agent and compare them to the baseline.

Predictions agents accepted

The widget shows the correct predictions that your agents used during case management over time. If this number is trending downward, you can look to retrain your model.

Predictions agents replaced

The widget shows the incorrect predictions that your agents removed during case management over time. If this number is trending upward, you can look to retrain your model.

Predictions the model skipped

The widget shows the number of predictions that were skipped by the model based on the model, output field, and date range selection.

Performance overview

The performance overview table shows the mean percentage values for correct, incorrect, and skipped data for each combination of model and output field.

Track usage of individual field predictions over time

The bar chart tracks the usage of the individual field predictions over time. Each bar in the chart shows three components, which are the predictions accepted, the predictions replaced, and the predictions that were skipped by the model. A red outline around each bar represents the total number of records for each day. To compare specific components, navigate to the legends and deselect the ones that you don't want to include so that you can have a more customized and focused comparison based on user preferences. By default, the view displays the number of predictions. However, you have the option to switch to the percentage view by toggling the **Show Percentage** option. In the percentage view, you can also access the information about the baseline that was replaced and accepted, which is derived from the training data. This option enables you to gain insights into the performance of the model with the baseline.

Track usage of model predictions over time

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The bar chart monitors the usage of the model over time and is similar to the bar chart in the "Track usage of individual field predictions over time" data. The field selections enable users to compare predictions over time across a maximum of three fields.

Note:

- When you refresh the page, the configurations, model selection, fields, usage type, and Show percentage toggle selection are retained.
- The Model and Output field options support multi-select functionality so that you can compare the average number of training records and analyze how your agents use the predictions of different models. When multiple models are selected, the Compare how agents used models' predictions section enables your agents to compare the selected models across different usage types. The chart also supports toggling between the count and percentage. It also displays the baselines for accepted and replaced predictions when you're using the percentage model.

Using Task Intelligence analytics

Navigate to **All** > **Task Intelligence for Customer Service** > **Monitoring** to access the Task Intelligence Analytics page.

You can view the analytics for all of your models or each individual model. To select a model, do the following actions:

1. Select **Model** to access analytics for an individual model.
2. Select a model from the list of models that have been created from the Task Intelligence Admin Console.
3. Select **Apply**.

To clear the selected model, select **Model** and then select **Clear**.

View Task Intelligence prediction history

View details about historical predictions in the Predictor Result [ml_predictor_results] table.

The Predictor Result table includes entries for each prediction result, including the predicted language, predicted and actual values, and prediction confidence. You can use the data in this table to monitor model performance.

Note: Records are created in the Predictor Result table regardless of the model prediction behavior, including the Testing behavior that doesn't add prediction values to the case.

Viewing prediction data

Navigate to **All** > **Task Intelligence for Customer Service** > **History** to view the Predictor Result list.

Users with the following roles can access the **History** module:

- Task Intelligence admin [sn_csm_ml_task.ti_admin]
- Customer Service manager [sn_customerservice_manager]

Categorization feedback captures values when the status of a case changes to Closed. It captures these values if:

- Case categorization is active.
- The predicted field value is different from the case field value.

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Categorization feedback works for record categorization solutions and for solutions with and without attachments. Email categorization solutions are trained using data from the Email [sys_email] table. Case categorization solutions are trained using data from the Case [sn_customerservice_case] table or from tables that extend the Case table. Interaction categorization solutions are trained using data from the Interaction [interaction] table.

Categorization feedback is triggered by a flow.

- When email information is used for prediction, the final input values remain empty.
- When attachment information is used for prediction, the attachment sys_ids are not included in the final input values.

Categorization feedback stores the following values in the Predictor Result table:

- Predicted Output Value Name
- Predicted Input Value Names
- Predicted Output Value
- Predicted Input Values
- Final Input Value
- Final Output Value
- Predicted Confidence (percentage)

If the values for a case have been predicted using an email categorization solution:

- The Final Input Value remains empty because it is not expected that the agent will modify the values of the email, such as subject and body.
- The final value in the Predicted Output Value is stored in the Final Output Value once the case is closed.

If the values for a case or interaction have been predicted using a record categorization solution:

- The values from the fields defined in Predicted Input Value Names are stored in Final Input Value.
- The final value in the Predicted Output Value is stored in the Final Output Value once the case is closed.

Email sentiment replies

Duplicate entries can be posted in the Predictor Result table for email sentiment replies. To help prevent these duplicate entries, deactivate the *`Predict Sentiment for Cases`* inbound email action. For more information, see Inbound email actions.

View prediction on field change

Agents can use Task Intelligence to predict values for configured fields before a case is created and after a case is created.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager or ti_admin

About this task

When you create a case or after a case is created, the Task Intelligence feature predicts values for the configured fields based on the short description or description.

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Note:

- If you update the case, the values for these fields are not predicted again.
- View prediction on field change is also available for interaction records.

Procedure

1. Create a case.
2. Enter information in the **Short description** or **description** field and then tab to the next field. Based on this information, the system predicts the values for configured fields without saving the case form.

   Note: If the system cannot predict values based on the short description, these fields remain blank.

3. **Optional:** Change the values in the predicted fields if needed or enter values for fields where Task Intelligence has skipped prediction.

   (Optional) The system does not overwrite user-entered values for the predicted fields.

4. Select **Save**.
   The data is saved in the record and persisted in the predictions table. A message is displayed to the agent indicating that the fields may have been modified, prompting them to save the revised predictions.

View similar case recommendations

The similar case recommendation feature allows customer service agents to quickly find similar cases that can provide helpful information about a current case. This feature can also provide recommendations about cases that may be related to major issues.

By performing a contextual search based on a case's short description, the system generates a list of similar records. This provides agents with a list of cases that are similar to the current case. These similar cases may provide helpful details or resolution information for the current case. Task Intelligence can also suggest potential major issues and major cases.

With the similar case recommendation feature, customer service agents can:

- Identify cases similar to the current case.
- Copy resolution notes from resolved cases to the current case.
- Link the current case to a similar case.
- View a list of open and resolved cases similar to the current case and submit the current case as a major case candidate. Three similar open and resolved cases are displayed in the list of results.
- View one or more similar major cases, that are displayed first in the list of results. Agents can use an available action and link the current case as a child to a major case.

When using these similarity models in the workspace, the agent can open a case record, select the **Recommendations** tab in the contextual side panel, and then select the **Suggested actions** sub tab to see the following:

- One for propose major case and one for similar major case card (if enabled).
- Up to three similar open case cards (number of cards displayed is customer configurable).
- Up to three similar resolved case cards (number of cards displayed is customer configurable).

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Order of cards displayed in Suggested actions:

- Similar major case (if there is a major case)
- Propose major case
- Similar resolved cases
- Similar open cases

Actions on cards:

- Propose major case: The current case is proposed as a major issue.
- Copy resolution notes: Copies resolution nodes from similar case to current case (does not copy resolution code).
- Link case: The current case is linked as a child of the similar case.

Any changes made to the current case and saved will trigger a refresh of the recommendations, checking for both new and obsolete recommendations.

Plugins: The configuration for the similar case recommendation feature is included with the Case Management Core plugin (com.sn_customerservice). The similar case recommendation feature has a dependency on Major Issue Management – activate the Major Issue Management plugin (com.sn_majorissue_mgt).

For more info, see Similar case user actions

Use Guided Decisions in playbooks to resolve cases

As an agent, work your way through a decision tree in a playbook to help troubleshoot a case and get recommendations on the next possible steps in solving the case.

Before you begin

Role required: sn_customerservice_agent

About this task

A decision tree presents a series of questions that you can answer and provide inputs where required. The decision tree evaluates your answers and provides the next set of questions or gives you guidance on what to do next. For example, the guidance can be to attach a knowledge article or propose a solution to a customer to help resolve an issue.

Depending on the context of the case that you're working on, decision trees appear in playbooks in CRM Workspace or as a recommended action in CRM Workspace. For details on using recommended actions, see Use Guided Decisions in recommended actions to resolve cases.

Procedure

1. Open CRM Workspace.
2. Open a case that you want to work on.
3. Select **Playbook**.
4. Work your way through a decision tree by providing inputs and proceeding by going to the next or previous set of questions, or dismissing the decision tree flow.
5. **Optional:** In the View my responses tab, select the Edit icon) next to the node to modify your selection or entered value.
6. Select the action button or dismiss the final guidance.
   The Activity list is updated with the action taken.

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Use Guided Decisions in recommended actions to resolve cases

As an agent, work your way through a recommended action of type decision tree to help troubleshoot a case and get recommendations on the next possible steps in solving the case.

Before you begin

Role required: sn_customerservice_agent, admin

About this task

A decision tree presents a series of questions in the contextual side panel that you can answer and provide inputs where required. The decision tree evaluates your answers and provides the next set of questions or gives you guidance on what to do next. For example, the guidance can be to attach a knowledge article or propose a solution to a customer to help resolve an issue.

Depending on the context of the case that you're working on, a decision tree can be displayed as a Recommended Actions card in the contextual side panel of the CRM Workspace.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open a customer service case that you want to work on.
3. Select the Recommended Actions icon ( ) in the contextual side panel.
   Depending on the case context, the side panel might display Recommended Actions cards for guidances and decision trees.
4. Review the Recommended Actions cards and determine whether you want to select a recommended action that has a decision tree.
   - To accept a recommendation, select the action button on the card.
   - To remove a recommendation from the contextual side panel, select **Dismiss** on the card.

     The recommendation card moves from the **Current** tab to the **History** tab.
5. Work your way through a decision tree by providing inputs and proceeding by going to the next or previous set of questions, or dismissing the decision tree flow.
6. **Optional:** In the View my responses tab, select the Edit icon) next to the node to modify your selection or entered value.
7. Select the action button to apply the resolution or take the action proposed.
8. **Optional:** Continue reviewing the Recommended Actions cards and accept or dismiss them as needed to resolve the issue.

Using the Recommended Actions application

Through the Recommended Actions application, use the recommended actions of type guidance and guided decision tree in your workspace to resolve cases quickly. Use the field recommendation to get recommendations on the field values. Use the AI search option to search the relevant resources from various sources.

Recommended actions

Recommended actions appear as cards in the contextual side panel of your workspace. Depending on the open record type, these cards contain information to help find the fastest resolution path, minimizing time spent researching and gathering information from different sources.

You can take three types of actions:

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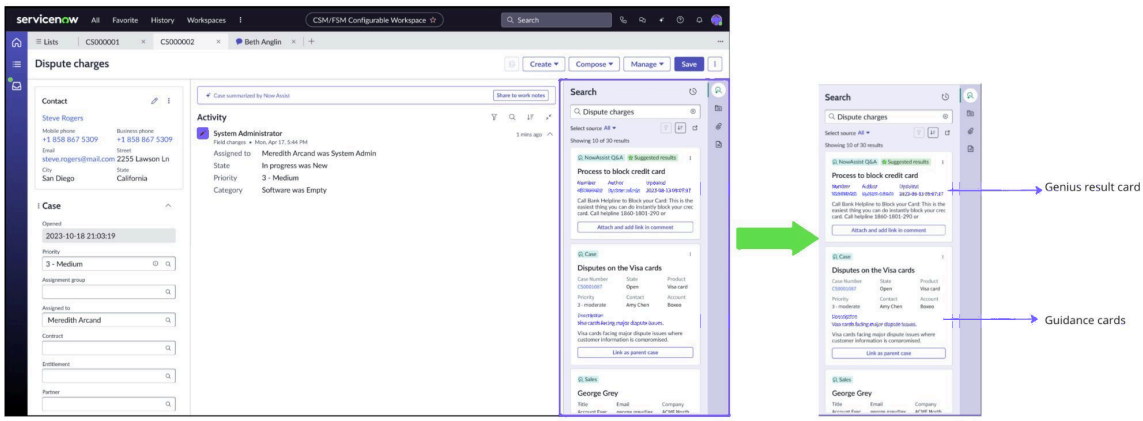
- **Guidance**: An action that can be performed or helpful information to share.
- **Decision tree**: A guided flow to follow that walks you through a series of questions that help you determine the appropriate action.
- **Field recommendations**: Recommended values to use for the fields in the record. Recommended field values are auto-filled or shown as messages underneath the fields for the new records. The recommended field values are shown as messages only underneath the fields for the existing records.

Recommended action cards in a workspace



Recommended action cards display the following information:

- Hint that briefly describes the recommendation.
- Preview that shows a short summary of the recommended action, which can include an image and links to helpful articles.
- Options to accept or dismiss the action.

When multiple cards are displayed, they're arranged according to the Order value set when they were created.

Primary and secondary actions

The recommendation that you select determines what is displayed next in the contextual side panel or subtab and how the record is updated. Some actions involve a single selection that is performed immediately such as **Acknowledge**, **Attach and add link in comment**. Other actions might have secondary actions that you can enable after selecting the primary action in the card. The following table explains a few primary and secondary actions.

Recommended Actions

Primary action	Secondary action	Guidance name
Select the **View and attach article** to open the knowledge article in the side panel for review.	Select secondary actions, such as **Dismiss** to cancel the recommendation or **Attach article** to attach it to the case or select an option from the More actions icon (⋮).	Review and attach article

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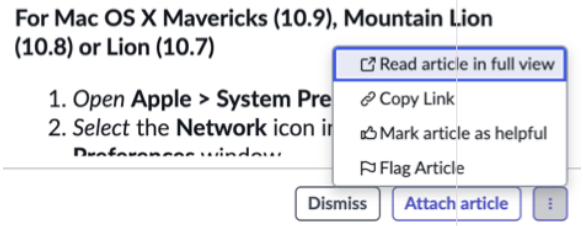
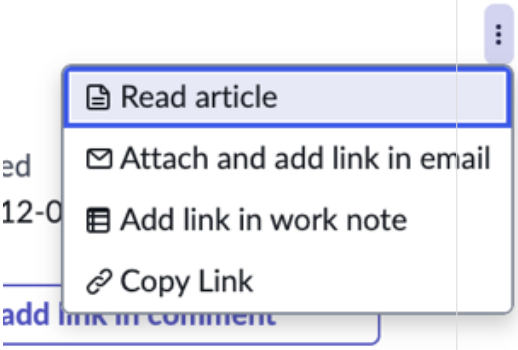
Recommended Actions (continued)

Primary action	Secondary action	Guidance name
	 Select back to go back to the recommended cards list.	
Select **Attach and add link in comment** to compose a comment and **Post comments**.	Select secondary actions from the More actions menu ( **Note:** The primary and secondary actions are configurable.	Attach and share article

Recommended Actions process

Recommended Actions

Item	Description
Single-click action	• The guidance moves to the in-progress or completed state. • A message indicates that the action was performed or completed. The system updates the record accordingly. • The selected recommendation card moves from the **Recommended actions** or **Search** tab to **Action history**. The card displays the action performed for the recommendation and any outputs, such as a credit report and credit score generated for the customer.

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Recommended Actions (continued)

Item	Description
Contextual side panel or subtab action	• When the action button is selected, the guidance doesn't move to the in-progress state. Other users can still see and act on this guidance. • When the action button is selected in the detail experience, the guidance moves to in-progress or completed state. • A message indicates that the action was performed or completed. The system updates the record accordingly. • The selected recommendation card moves from the **Recommended actions** or **Search** tab to **Action history**. **Note:** For the guided decision trees, when the preview button is selected, the guidance opens in the side panel and moves to the in-progress state.
Error handling	If an action ends up in the error state, the following occurs: • An error notification is shown. The system updates the record accordingly. • The card displays the error state for the recommendation. • When dismissed, the card moves to **action history**.

Field recommendations

Field recommendations are messages that display either under fields on a form or auto-fill a recommended value within the field. For example, a field recommendation can recommend an assignment group based on the text in a case's short description.

You can read the description of the recommendation and use the recommended value in the fields.

AI search

AI search enables you to search for the relevant resources to resolve cases or customer issues. Depending on the AI search configuration, the AI search tab displays search results, genius result answers, or both. AI search results appear in the form of guidances that you can act on. Genius result answers are the most relevant answers or the top results for the search query along with the action that you can take directly from the card.

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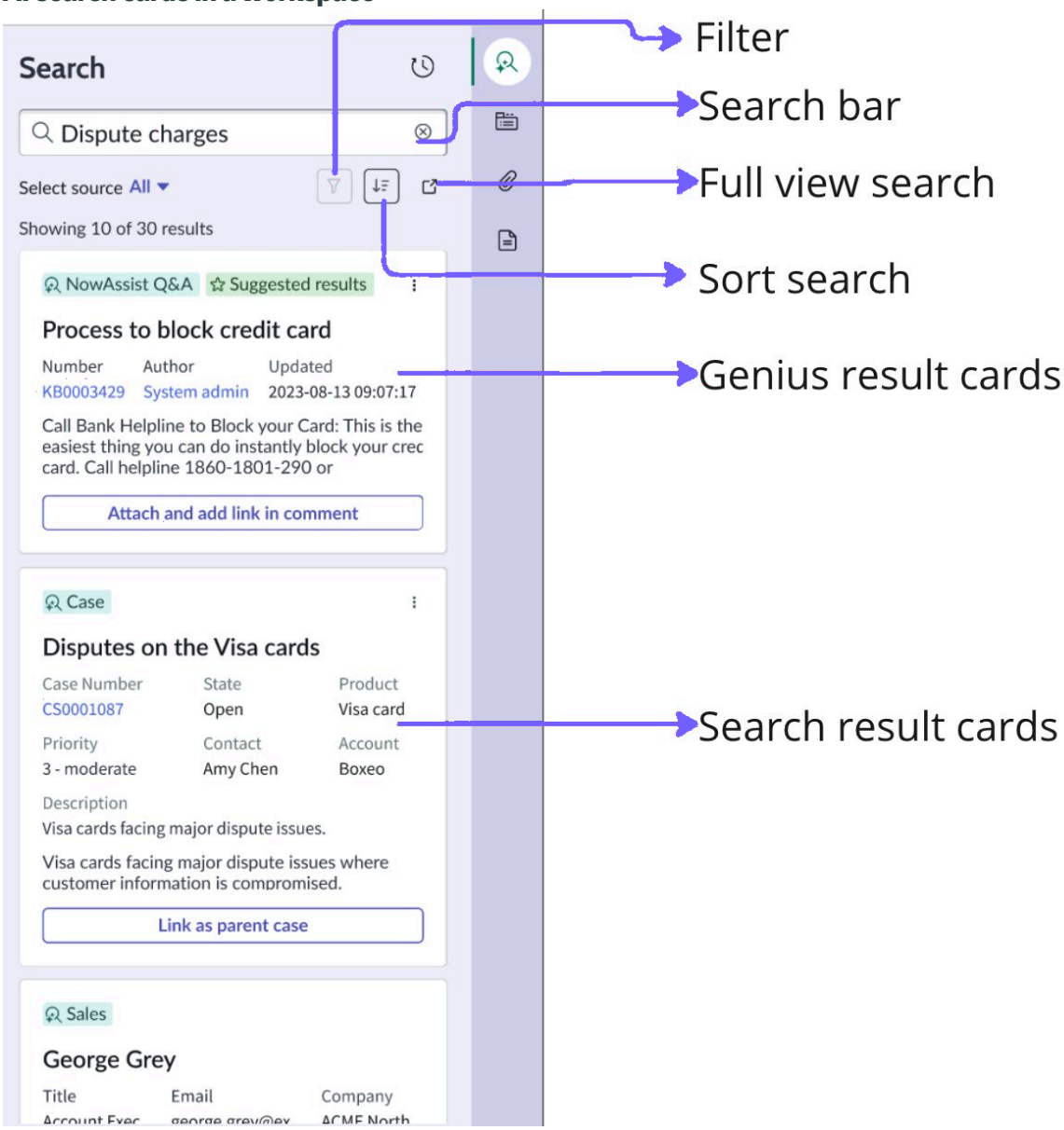
AI search cards in a workspace



Elements on the AI search cards

Element	Description
Search count	Displays counts of the total number of matching search results. The search filters show the number of matching results for each search source.

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Elements on the AI search cards (continued)

Element	Description
	Note: The Search results that are displayed and the total search count might vary due to security permissions or if the search result has already been executed. The executed guidances are moved to **Action history** and reflect in the total search count but the executed guidances won't show up in the search results.
Search bar	Accepts the search query that produces the search results. You can modify this search query and search again to view different results.
Search filters	Displays filter options for refining search results by search source.
Full view search	Displays the search results in a new subtab with an expanded view.
Sort search results	Sorts the search results based on the selected option.
Search result cards	Displays the search icon, search source, title, summary field values, and text snippet for each search result, with search query terms highlighted in title and text snippets. You can select a result to view its source record in full or select the action to act on the guidance.
Genius result cards	Displays the genius result icon, title, summary of the answer, and an action to take on the genius result card. **Note:** Genius result cards do not always show a summary of the answer.
Show more	Displays more search results.

Use Recommended Actions to resolve cases

As an agent, you can use Recommended Actions to help address customer issues and resolve cases quickly.

Before you begin

Role required: sn_nb_action.next_best_action_user

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Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open a customer service record that you want to work on.
3. Select the Recommended Actions icon ( ) in the contextual side panel.
4. Select the Recommended Actions tab.
   Depending on the record context, cards for guidances, decision trees, or both are displayed.
5. Review the Recommended Actions cards and do one of the following:

   a. To accept a recommendation, select the action button on the card.
   The result depends on the type of recommendation:

   Recommended action results

Selected recommendation	Description	Result
Decision tree	A guided flow presents a series of questions in the contextual side panel that you can answer to get to the appropriate guidance.	After your inputs, the system provides a guidance that you can select.
Guidance	A recommendation for handling the case, for example: ▪ View and attach a knowledge article ▪ Attach and add link in comment ▪ Read article ▪ Attach and add link in email ▪ Add link in work note ▪ Copy link ▪ Submit an external request for an item, such as a credit report or loan application. ▪ Create a work order to handle the case.	The system performs the action. For example: ▪ Knowledge article guidance: The article opens in the **Current** tab of the contextual side panel or in a subtab for review. You can then choose a secondary action for handling the case. ▪ External request guidance: A subtab opens in the record to enter more information needed for the request, such as a loan application.

   b. To remove a recommendation from the contextual side panel, select **Dismiss** on the card.
   The recommendation card moves from the **Recommended Actions** tab to the **History** tab.

6. Continue reviewing the Recommended Actions cards and accept or dismiss them as needed to resolve the issue.

Use Recommended Actions to attach knowledge articles to chat

As an agent, use chat in Recommended Actions to resolve issues of the customers by attaching knowledge articles.

Before you begin

Role required: sn_nb_action.next_best_action_user

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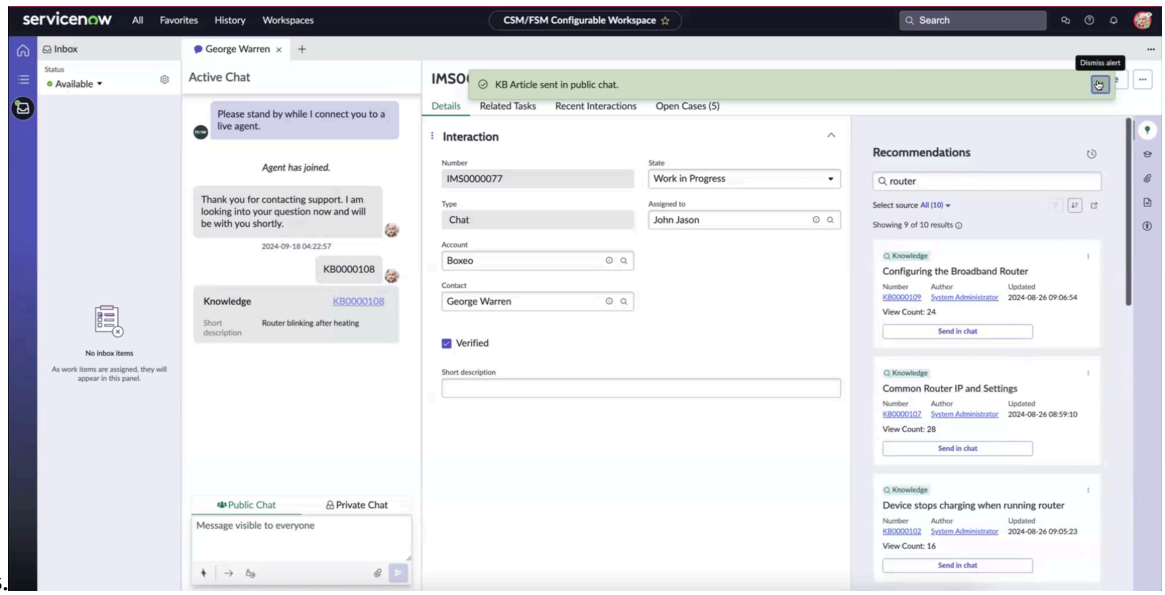
Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace** > **Inbox**.
2. Change the status from Offline to Available to see all the active chats.
3. Select **Accept** to start a chat conversation with a customer.
   The active customer chat session and corresponding chat details are displayed in a new subtab.
4. Select the Recommended Actions icon ( ) in the contextual side panel.
   Based on the issue, the Share KB in chat interactions guidance cards are displayed.
5. Review the Recommended Actions cards.
6. Select **Send in chat** from the side panel to send the respective knowledge article to the customer.
   The **Send in chat**, part of Share KB in chat interactions guidance, is disabled for the inactive or concluded chats.



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LIVE AGENT

Please stand by while I connect you to a live agent.

Agent has joined.

A Thank you for contacting support. I am looking into your question now and will be with you shortly.

just now

A KB0000108

Knowledge	KB0000108
Short description	Router blinking after heating

Type your message

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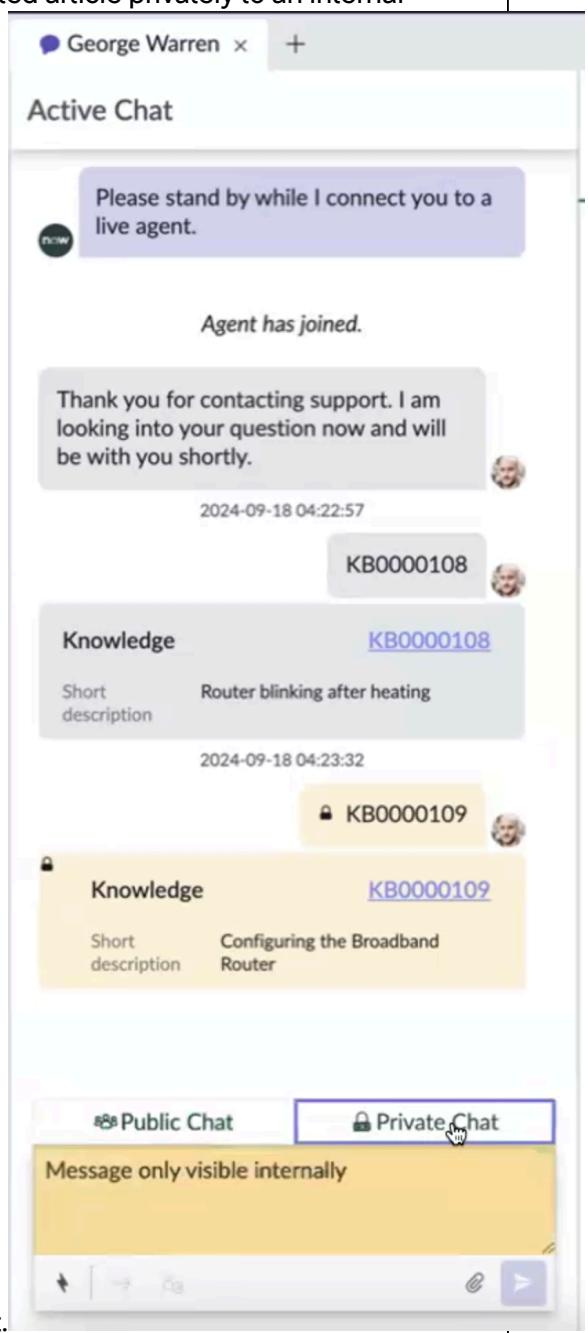
The knowledge article number and its' link is sent to the customer in the public chat, by default. Additionally, the used recommended card is moved to the history.

7. Following are the other secondary actions.

Secondary Actions

Actions	Description
Send in private chat	Select this action if the customer is restricted to the article and to share the selected article privately to an internal agent. 
Copy Link	Select this action to copy the link of the selected article.
Read article	Select this action to read the article and to select a secondary action. Here, you can also **Read article in full view**,**Mark article**

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Actions	Description
	as helpful, **Flag article**, **Send in private chat** and, **Copy link**.

8. Continue reviewing the Recommended Actions cards and accept them as required, to resolve the issues.

Related topics

Share KB in chat interactions guidance

Use AI search in Recommended Actions to resolve cases

As an agent, use AI search in Recommended Actions to help address customer issues and resolve cases quickly.

Before you begin

Role required: sn_nb_action.next_best_action_user

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **CSM Configurable Workspace**.
2. Open the customer service record.
3. Select the Recommended Actions icon ( ) in the Contextual Side Panel.
4. Select the **Search** tab.
5. In the **Search bar** field, enter your search query.
6. Select the Search icon ( ) or press Enter.
   The AI search results or genius results or both are displayed as cards.

   The relevancy score displays on the search result recommendation cards in the Search tab for following guidances provided with the base system. The relevancy score indicates how well a search result matches the agent's query.

   - Default guidance for search results
   - Attach and share article
   - Share KB in chat interactions
   - Case resolution guidance
   - All no-code guidances (Link incident to current case, Link problem to current case, and Link change request to current case).

   Note: The relevancy score displays only when the **Show relevancy score for results** check box is enabled in the Context form. For more information, see Create a context in Recommended Actions.

7. **Optional:** Select the **Filters** button, select a search source to filter the results and then select **Apply**.

   (Optional) The number of search sources selected appear on the Filter button once you apply the filters. The following table shows the actions that you can perform on the search results in the Filters section in the Search tab.

   Note: When top N results are enabled, the **Filters** button and the Sort icon does not appear. For more information, see Create a context in Recommended Actions.

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Actions in the Filters section in the Search tab

Action	Description
Filter search results corresponding to multiple sources	The list of search sources of all the search results appear in the Source section in the Filters module. You can filter the search results by selecting multiple sources at the same time. The source type appears on the search results. (Optional) When one or more sources are selected, all the facets corresponding to all these selected sources appear enabling you to select field values to refine your search results further. For more information on facet filters, see the following row.
Filter search results at facet-level	(Optional) The dynamic facet filter options enable you to refine the search results by field value. The facets that appear depends on the sources you select. To expand or collapse a facet, select the + (plus) or - (minus) symbol by its name. When a field value under a facet of a source is selected, the remaining sources are deselected automatically and their respective facets also disappear. As a result, you'll be able to refine search results at facet-level for one source type only. The field values selected appear under the Any of the following selected section and its corresponding source appears under the All of the following selected section.
Sort search results	The following options are available by default: ○ Most relevant: The most relevant records are displayed on the top. This option is selected by default. ○ Updated (oldest): The least recently updated records appear on the top. ○ Updated (newest): The recently updated records appear on the top.
Remove the filters applied	Removes all the applied filters, when you select the **Clear all** button.

8. Review the search result or genius result cards and select the applicable result by selecting the action button to address the customer issue.
   The result card moves from the **Search** tab to **Action history**.
9. **Optional:** Select the full view search icon to get a detailed view of the search results in the Search page.

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Note: When top N results are enabled, the **Filters** button and the Sort icon does not appear on the Search page. For more information, see Create a context in Recommended Actions.

The following table shows the actions that you can perform on the search results on the Search page.

Filters on the Search page

Action	Description
Filter search results corresponding to multiple sources	The list of search sources of all the search results appear in the Source section in the Filters module. You can filter the search results by selecting multiple sources at the same time. The source type appears on the search results. (Optional) When one or more sources are selected, all the facets corresponding to all these selected sources appear enabling you to select field values to refine your search results further. For more information on facet filters, see the following row.
Filter search results at facet-level	(Optional) The dynamic facet filter options enable you to refine the search results by field value. The facets that appear depends on the sources you select. To expand or collapse a facet, select the + (plus) or - (minus) symbol by its name. When a field value under a facet of a source is selected, the remaining sources are deselected automatically and their respective facets also disappear. As a result, you'll be able to refine search results at facet-level for one source type only. The field values selected appear under the Any of the following selected section and its corresponding source appears under the All of the following selected section.
Sort search results	The following options are available by default: ○ Most relevant: The most relevant records are displayed on the top. This option is selected by default. ○ Updated (oldest): The least recently updated records appear on the top. ○ Updated (newest): The recently updated records appear on the top.
Remove the filters applied	Removes all the applied filters, when you select the **Clear all** button.

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Action	Description
Hide the Filters section	Hides the filters section when you select the **Hide filters** button.
Display the Filters section	Displays the filters section when you select the **Show filters** button.

Execute a playbook from Recommended Actions

Launch and execute a playbook directly from the Suggested Action tab in the Recommended Actions panel without switching applications or tools.

Before you begin

A playbook must be configured as a recommended action for your record type.

You must meet the criteria of the rule that recommends the playbook action (e.g., case category, priority level, or other conditions).

Role required: admin

About this task

When a playbook is recommended to you, it appears as an action card in the Recommended Actions (RA) panel. Selecting the playbook action launches the playbook workflow, which guides you through a series of steps to resolve the customer issue or complete the task.

Procedure

1. Open a case or interaction record the Agent Workspace.
2. Locate the playbook action card in the Recommended Actions panel.

   The playbook-based recommended actions display as cards with a title, description, and action button. The card title matches the playbook name.

3. Select the **Launch** button on the playbook card.

   The playbook execution initiates immediately. The playbook renders in the configured location (contextual side panel, or record view).

4. Follow the playbook workflow steps.

   The playbook guides you through a series of decision points and actions. Answer questions, select options, and complete embedded actions (such as creating a task or escalating) as prompted.

5. Complete the playbook.

   When you reach the final step and confirm completion, the playbook closes. The system automatically marks the related recommended action as completed and updates the record state if configured.

Result

The playbook execution completes successfully. You have followed the guided workflow and the system has recorded the execution for audit and training purposes.

What to do next

If needed, you can review the execution history of the playbook under the Recommended Actions history section to see past playbook runs, outputs, and timestamps.

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If multiple team members are working on the same record, the playbook execution state is synchronized across all users. If a colleague completes the playbook, it is marked as completed for you as well.

Using Playbooks for Customer Service Management

Customer service agents can use playbooks to complete the tasks and activities that are needed to resolve specific types of cases.

A playbook provides step-by-step guidance through the lifecycle of a customer service case.

A playbook includes multiple stages and each stage includes one or more activities for an agent to complete. When using a playbook, agents can:

- View the playbook stages and activities.
- Select an activity and perform the work necessary to complete that activity.
- Mark an activity as complete and move to the next activity or stage.
- Complete the stages and activities necessary to resolve the case.

Several features are available to agents when using a playbook, depending on the playbook configuration.

Playbooks for CSM tasks

Create a record using a playbook	If a playbook is configured to use the record generator feature, customer service agents can create a record using a playbook activity.
Filter playbook activities	Filter the activities in playbook stages by the selected user or activity state.
Using the activity stream in the contextual side panel	Customer service agents can access the activity stream in the contextual side panel to communicate with requesters and make internal notes about the work done on a record.
Viewing dynamic related records in the contextual side panel	Customer service agents can view dynamic related records that dynamically change based on the context of the current record or playbook activity.
Viewing ribbon information in the contextual side panel	Customer service agents can view ribbon information in the contextual side panel, including the case overview and timeline, Customer 360, and SLAs.
Add an optional activity	Add optional activities to different stages in a playbook as needed. For example, a customer may want to schedule an appointment to visit a location.
Summarize a case	Use the ServiceNow Otto for CSM case summarization skill to summarize the case details and display this information on the case record.

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Related topics

Playbooks in Customer Service Management

Configure Playbooks for Customer Service Management

Create a record using a playbook

Create a record using a playbook activity instead of a record form.

Before you begin

Role required: sn_customerservice_agent

About this task

If a playbook is configured to use the record generator feature, customer service agents can create a record using a playbook activity. Creating a record from a list or form, or from an activity in another playbook, opens the playbook and initiates the first activity. This activity guides an agent through the record creation process.

With additional configuration, you can also create a case from any of the following records that opens a playbook and initiates the first activity:

- Interaction
- Case
- Account
- Consumer

To create cases in this way, the following configuration is required:

- Enable the **Create Case** button from the Customer Service Case Types application for each of these records. This enables agents to create a specific type of case.

  See Configure customer service case types for more information about using the Customer Service guided setup and the Case Types category to configure case type UI actions.

- Configure the playbook to use the playbook record generator.

  For more information about configuring this feature, see Playbook record generator.

Procedure

1. Navigate to a list or form in CRM Workspace.
   For example, navigate to the All Onboarding Cases list.
2. Select **New**.
   If you selected **New** from the All Onboarding Cases list, the Onboarding playbook opens and initiates the first activity for collecting customer information.
3. Fill in the fields on the first activity card.
4. Select **Continue**.
   The system uses the customer information to create a case. The case number is added to the tab and the first activity in the first playbook stage is marked as complete. The second activity is highlighted as the current activity.
5. Collect additional customer information, if needed, and select **Save**.
6. Continue using the playbook stages and activities to resolve the customer's issue and complete the case.

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Filter playbook activities

Filter the activities in the playbook stages by the selected user or activity state.

Before you begin

Role required: sn_customerservice_agent

About this task

When an agent filters the activities in playbook stages:

- The stages containing activities that match the filter conditions are automatically expanded.
- The activities that match the filter conditions are displayed within the expanded stages.

If the current activity is included in the filtered results, it remains highlighted. If it isn't included, the first activity in the filtered results is highlighted.

Procedure

1. Open a case record that has an associated Playbook and select the **Playbook** tab.
2. Select the filter icon ( ) at the top of the playbook lifecycle to open the context menu.
3. Select one or more of the following filter choices:
   - A user in the **Assigned to** section.
   - An activity state in the **State** section.
4. Click outside the context menu to close the menu and apply the filter.
5. To clear the playbook activity filter, click the filter icon and clear the current selections in the context menu.

Related topics

Using the activity stream in the contextual side panel

Viewing dynamic related records in the contextual side panel

Viewing ribbon information in the contextual side panel

Add an optional activity

Summarize a case

Create a record using a playbook

Using the activity stream in the contextual side panel

Customer service agents can access the activity stream in the contextual side panel in CRM Workspace.

The activity stream enables agents to communicate with requesters and make internal notes about the work done on a record. The activity stream updates when the current activity in the playbook is updated.

Click the Activity stream icon ( ) in the contextual side panel to access the activity stream.

Agents can perform the following tasks in the activity stream.

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What agents can do in the activity stream

Task	Description
View posts for the case or case task	The current activity in the playbook work area determines the information that is displayed in the activity stream. Scroll through the posts in the Activity section to view case or task information. Click **Case** or **Task** at the top of the activity stream to switch views.
Add work notes or comments	In the Compose section: **1.** Select the type of activity: Work notes or Comments. **2.** Add the information to the text field. **3.** Click **Post Work Notes** or **Post Comments**. The post is added to the Activity section.
Filter posts	Click the filter icon ( ) at the top of the Activity section to display the filter selections: • **Post types:** Select the types of posts to view, such as work notes or attachments. • **Field changes:** Select specific fields to view information in posts for only those fields. • **Flagged:** Enable this button to view posts that have been flagged as important. • **Filter sets**
Sort posts	Click the Sort icon ( ) to sort posts by newest to oldest or oldest to newest.
Expand and collapse posts	Select expand icon ( ) to expand posts and collapse icon to collapse posts.
Compose emails	Send emails from the Activity stream without leaving the case view. In the Compose section: **1.** Select the Email tab. An email draft opens where you can send an email. **2.** Compose your email and click **Send Email**.

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Related topics

Filter playbook activities

Viewing dynamic related records in the contextual side panel

Viewing ribbon information in the contextual side panel

Add an optional activity

Summarize a case

Create a record using a playbook

Viewing dynamic related records in the contextual side panel

Customer service agents can view dynamic related records in the contextual side panel in CRM Workspace. This feature displays related records that dynamically change based on the context of the current record or playbook activity.

Agents can view, search, and sort the records in the Related Records tab in the contextual side panel. These records appear in the Related Records tab as read-only cards.

The Related Records tab displays related records that dynamically change based on the context of the current record or playbook activity. The records that are displayed in the Related Records tab depend on the following settings:

- The related record contexts and definitions that have been configured for a record or playbook activity.
- The agent's access permissions to data.

Depending on the related record configuration for the source record or playbook activity, agents can see the following types of related records:

- SLAs
- Emails
- Escalations for the case or customer (account and contact or consumer).
- Blocked By
- Sold Products
- Install Base Items
- Active Contracts
- Active Entitlements
- Special Handling Notes
- Tasks

What agents can do in Related Records

Task	Steps
View related records in the contextual side panel	Select the Related Records tab (☰) to view the Related Records list. Related records appear in the list in a card format. The initial set of records displayed in the list is determined by the record type selected. The displayed records can be changed using the filter located at the top of the list.

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What agents can do in Related Records (continued)

Task	Steps
Select the type of related record to view	Use the filter at the top of the Related Records list to select the type of related records to view. Agents can also use the filter to see the current selection. **1.** Click the Filter icon ( ). **2.** Select a record type from the drop-down menu. The drop-down menu includes the related lists that have been configured for the parent record.
Search the related records list	Use the search field at the top of the Related Records list to perform a text search. Records that match the search text are highlighted. **1.** Enter the search text in the search field at the top of the Related Records list. **2.** Select the search icon. If the search field is grayed out, search is not available for the selected type of related records.
Open a related record in a subtab	Select a card in the Related Records list to open the record in a subtab under the parent record. In the subtab, the agent can view the record details and perform available actions.
Open the related record list in a list view in a subtab	Select the list view icon ( ) to display the related records in a list view in a subtab under the parent record.
Create a new record for the selected related list	Create a new record for the record type currently selected in the Related Records list. This action opens a new record form in a subtab under the parent record. **1.** Select the Create record icon ( ) at the top of the Related Records list. **2.** Fill in the fields on the record form and select **Save**.

Related topics

- Filter playbook activities
- Using the activity stream in the contextual side panel
- Viewing ribbon information in the contextual side panel
- Add an optional activity
- Summarize a case
- Create a record using a playbook

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Viewing ribbon information in the contextual side panel

Customer service agents can view ribbon information in the contextual side panel in CRM Workspace.

Click the Record information icon ( ) in the contextual side panel to view ribbon information.

Agents can see the following information:

- Case overview: Displays an overview of the case details, including the case priority and state.
- Customer 360: Displays customer information such as the contact or consumer name, email address, and phone numbers.
- Timeline: Displays a chronological summary of case activities, including case state changes and interactions between the agent and the customer. It also shows how much time that the agent and customer spent on the case.
- SLAs: Displays active SLAs for the case, including time remaining, the SLA state, and any breaches.

Related topics

Filter playbook activities

Using the activity stream in the contextual side panel

Viewing dynamic related records in the contextual side panel

Add an optional activity

Summarize a case

Create a record using a playbook

Add an optional activity

Add optional activities to different stages in a playbook. Although customer processes follow a certain structure, optional tasks may be necessary in some instances. For example, a customer may want to schedule an appointment to visit a location.

Before you begin

This feature must be configured by an administrator. If optional activities aren't configured for a playbook, the **Add Activity** menu item isn't available. For more information, see Configure playbook stage and activity visibility.

Role required: agent

About this task

You can add some optional activities to any stage while you can add others only to a single stage. You can't insert an optional activity as the first activity in a stage or between two completed activities. An approval request optional activity is supported only for a business-to-business (B2B) use case.

An agent or a fulfiller can insert an approval request optional activity during a#playbook#un in process-based page variants for complaint case type (in the triage and research stage) or onboarding case type (in the due diligence stage).

Procedure

1. Open a playbook in **CSM Configurable Workspace**.
2. Find a stage by selecting the More actions menu.
3. Select **Add Activity**.

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Add Activity isn't displayed if no optional activities are available in this stage.

4. In the location that you want to add the activity to the playbook, select **+ Add activity here**. In the modal that opens, you can see the placeholders where you can insert an activity.
5. Select the activity that you want to add to the playbook.
6. Select **Done**.

Summarize a case

Enable your agents to summarize the case details and to display this information on the case record by using the ServiceNow Otto for CSM case summarization skill.

Overview

The case summarization skill helps agents to come up to speed quickly on customer service cases. With this skill, agents can:

- Quickly generate the summaries of the customer service cases to understand the case context.
- Provide a summary of the actions taken and the resolution details.

Generating a case summary

Agents can use the case summarization skill to generate a case summary that includes information from the following case record fields:

- Short description
- Description
- Priority
- State

The summary also includes information from the case activity stream. Agents generate a case summary by using the Case summary by Now Assist component on the case record in CRM Workspace.

Note: The case summary component appears below the playbook activity picker in the side panel in the process-based pages and it appears above the activity stream in the CSM default record page.

Case summary by Now Assist component

In CRM Workspace, agents use the Case summary by Now Assist component to generate a summary. The case summary component is collapsed by default. When an agent generates a case summary by selecting **Summarize**, the component expands to display the summary information, including a description of the issue, the actions taken, and the next steps. For longer summaries, select **View more** and use the scroll bar to view the content. After generating a summary, the agent can:

- Review the summary information and edit as needed.
- Provide feedback on the generated summary.
- Add the summary information to the case work notes.
- Copy the summary information to the clipboard.

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Agent management

Manage agents effectively to deliver exceptional customer service. Recruit, train, and monitor their performance continuously. Support your customer service agents consistently. Equip and motivate them well to enhance customer satisfaction and operational efficiency.

Agent management for customer service

Time recording for Customer Service Management	Record time worked on cases and case tasks. Time worked entries automatically generate time cards and time sheets for manager approval.
Workforce Optimization for CSM Agent Workspace	Manage your profile and schedule using Agent Workspace. Use coaching to review and complete assigned training.
Assign a case from the assignment workbench	Users with the customer service manager role can assign a case to an agent from the assignment workbench.
Manage special handling notes	Managing special handling notes is a critical component of Customer Service Management. These notes provide essential information to customer service agents about the specific needs and preferences of individual customers, ensuring that personalized and attentive service is delivered consistently. By effectively managing special handling notes, organizations can enhance the customer experience, build stronger relationships, and resolve issues more efficiently.
View team members assigned to an account	View the team members for a specific account.
Add an agent to the chat support assignment group	Agents must be added to the chat support assignment group before they can receive chat requests. This assignment group is used by theCustomer Service Management chat communication channel to route chat requests.
Approve a service contract	Approve a service contract for a customer account.
Outsourced Service Provider manager tasks	Manage various tasks as an Outsourced Service Provider (OSP) Manager, including onboarding Outsourced Service Provider agents, viewing unassigned cases, and assigning cases to groups or agents under your supervision.

Time recording for Customer Service Management

Record time worked on cases and case tasks. Time worked entries automatically generate time cards and time sheets for manager approval.

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Customer service agents (users with the sn_customerservice_agent role) can record time worked on case-related activities, create time cards and time sheets, and submit for approval. Managers can approve time sheets, define cost rates for different types of activities, and convert to expense lines.

The time recording feature extends the functionality of the Time Card Management application to Customer Service Management. Agents can record time worked on cases and tasks directly from the Case or Case Task form and time spent on other activities, such as meetings or training, from the Time Worked form. Time worked entries automatically create time cards for each task and selected work category. Time cards are automatically included in a weekly time sheet.

The time recording feature also extends the functionality of the Cost Management application to Customer Service Management. Customer service managers can create labor rate cards, which define different cost rates for different activities. Time sheets use labor rate cards to determine costs and to generate expense lines.

Agents can modify the hours recorded on time cards. Once a time sheet is approved and a time card is processed, the agent can still go back and modify the time worked. The time sheet reverts to the **Pending** state and new time cards are created. If an agent adds more time worked records to an approved time sheet for the same week, a new time sheet record is created for the current week.

Managers can view time worked records, time cards, and time sheets for agents in their assignment groups, as well as approve and reject time sheets. After a time sheet is approved, the system processes the time cards and uses rate cards based on the time card category to create expense lines.

Time recording plugin

The time recording feature requires the Customer Service Management plugin (com.sn_customerservice) and the Time Recording for Customer Service plugin (com.snc.csm_time_recording).

User roles

The time recording feature adds the following roles.

Time recording user roles

Role	Description
Time card user [timecard_user]	Record time worked on cases and tasks. View, modify, and delete time worked entries on time cards and submit time sheets for approval. Users with the customer service agent (sn_customerservice_agent) role inherit the timecard_user role. This role restricts access to the time sheets, time cards, and time worked records created by the agent.
Time card administrator [timecard_admin]	Review, approve, and reject time sheets for customer service agents. Users with the customer service manager role (sn_customerservice_manager) inherit

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Time recording user roles (continued)

Role	Description
	the timecard_admin, timecard_approver, and timecard_manager roles. This role restricts access to the time sheets, time cards, and time worked records created by the agents in a manager's assigned groups.

System properties

The time recording feature adds the following properties.

Time recording system properties

Property	Description
com.snc.time_card.time_worked	Enables the time recording feature for Customer Service Management. The default setting is **false**. **Note:** This property has been replaced by the **Auto fill time card with time worked entries** field on the Time Sheet Policy form. When this field is enabled, the user's time card is auto-filled with the information from their time worked entries.
com.snc.time_card.default_rate	The default hourly rate used when processing time cards if a rate from a labor rate card is not available.

Time Sheet policy

The time recording feature uses the **Default time sheet policy**.

For users with the sn_customerservice_agent role, creating time worked records automatically creates or modifies time cards regardless of the setting for the **com.snc.time_card.time_worked** system property. The time sheet policy controls this functionality. The system administrator can disable the auto-creation of time cards for a specific user with the sn_customerservice_agent role by creating a separate time sheet policy for that user.

Labor rate cards

The time recording feature provides one labor rate card: **CSM Rate Card (Default)**.

If needed, system administrators can create additional labor rate cards. Navigate to **Cost** > **Costs** > **Labor Rate Cards** and click **New** to create a labor rate card.

Record time worked for a case or activity

Customer service agents can record time worked on a case or case task as well as time spent on other activities.

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Before you begin
Role required: sn_customerservice_agent

About this task
Agents can record time worked from a case or case task. Time worked can be recorded regardless of the case or task state. Agents can also record time worked from the Time Sheets module by navigating to **Time Sheets** > **Time Recording** > **My Time Worked.**

When an agent creates a time worked record, a time card and time sheet are automatically created for the week based on the work date. The time card is created for the task and the category type. The total hours recorded on each time card are recorded on the current time sheet in the **Time Cards** related list.

Procedure
1. To record time worked from a Case form or Case Task form.

Option	Description
Platform interface	Navigate to a case or task and select **Record Time**.
Agent Workspace	Navigate to a case or task, select the more UI actions icon (···), and select **Record Time**.

   This action opens a Time Worked form with the **Task** and **User** fields already populated.

2. To record time worked from the Time Sheets module.

   a. Navigate to **Time Sheets** > **Time Recording** > **My Time Worked** and select **New**.
   This action opens a Time Worked form with the **User** field already populated.

   b. Select a task number in the **Task** field.

3. Select the **Work Date**.
4. Select a **Category** for the time being recorded.
5. Fill in the **Time worked**.
6. Provide any additional information in the **Comments** field.
7. Select one of the following actions.

Option	Description
Platform interface	Select **Submit**.
Agent Workspace	Select **Save**.

   The Time Worked form is saved and added to the following lists:

   - The **Time Worked** related list on the Case or Case Task form.
   - The **Time Cards** related list on the current Time Sheet form.
   - The Time Worked list in the Time Sheets module.

   If this entry is the first time worked entry for the selected category, a time card is created for that category. If a time card for the category already exists, the time worked record is added to that card.

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Review time worked for a case or activity

Customer service agents can review time worked on cases and case tasks.

Before you begin

Role required: sn_customerservice_agent

About this task

The **Time Worked** related list on the Case and Case Task form displays the time worked records that have been created for the case or task. From this related list, agents can review their recorded time, add new time worked records, and also delete records.

Procedure

1. Navigate to the desired case or case task.
2. Go to the **Time Worked** related list.
3. To view a time worked record, click the **Comments** for that record.

Modify or delete time worked entries for cases or activities

Agents can modify and delete existing time worked entries and create new entries after a time sheet has been approved.

Before you begin

Role required: sn_customerservice_agent

About this task

An agent can modify or delete time worked entries for an approved time sheet. Any changes to these entries update existing time cards, creates new time cards if needed, and generates an updated time sheet.

Note: Don't manually edit time cards. Edit the original time worked entries, which generate updated time cards and time sheets.

Procedure

1. To modify or delete a time worked entry:
   - Navigate to the desired case or case task, select the **Time Worked** related list, and select the desired entry.
   - Navigate to **Time Sheets** > **My Time Worked** and select the desired entry.
2. To modify the entry, change the desired fields and select **Update**.
3. To delete the entry, select **Delete**.

Review a time card

Customer service agents can review time cards created from time worked records.

Before you begin

Role required: sn_customerservice_agent

About this task

The **Time Worked** related list on the Case and Case Task form displays the time worked records that have been created for the case or task. This list also displays the time cards created from the time worked records.

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Procedure

1. Navigate to the desired case or case task.
2. Go to the **Time Worked** related list.
3. To view a time card, click the **Time Card** for that record.
   The time card provides a breakdown of the time worked for this case or case task by day.

Review and submit a time sheet for a customer service agent

Agents can review and submit time sheets to managers for approval.

Before you begin

Role required: sn_customerservice_agent

About this task

The total hours worked for each category are recorded on the time card and on the time sheet. From the time sheet, you can see total hours by day and by category.

Procedure

1. Navigate to **All** > **Time Sheets** > **My Time Sheets** > **Current Time Sheet**.
2. If desired, review the time cards associated with the time sheet in the **Time Cards** related list.
3. Click **Submit Time Sheet**.
   The time sheet is submitted to the manager for approval. The state of the time sheet changes from **Pending** to **Submitted** and the form becomes read-only. The state of the associated time cards also changes to **Submitted**.

Review and approve time sheets for customer service agents

Managers can review time cards and time sheets for agents in their assignment groups.

Before you begin

Role required: sn_customerservice_manager

About this task

When a time sheet is approved, the time cards are processed and used to create expense lines that reference the defined labor rate cards.

Procedure

1. Navigate to **All** > **Customer Service** > **Manager** > **Time Sheets - Pending Approval**.
2. Select a time sheet.
3. If necessary, review the time cards associated with this time sheet in the **Time Cards** related list.
4. Click one of the available actions.

Option	Description
Approve	The state of the time sheet and the associ ated time cards changes to **Processed** and these records become read-only.
Reject	The state of the time sheet and the associ ated time cards changes to **Rejected**. The customer service agent can modify the time sheet and submit again for approval.

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Review expense lines created from time cards

Review the expense lines created from the time cards and time sheets submitted by customer service agents.

Before you begin

Role required: financial_mgmt_user

Procedure

1. Navigate to **All** > **Cost** > **Costs** > **Expense Lines**.
2. Select the desired expense from the Expense Lines list and view the details.

Location Based Holiday Calendar Management

Location-based holiday calendars helps to improve workforce scheduling by mapping holidays to specific regions, enabling managers to plan shifts with accuracy, and reduce manual adjustments.

Overview of location-based holiday calendar management:

The location-based holiday calendar to support varied work schedules and assign agents and technicians to shifts for defined time periods. The calendar provides fixed and variable schedules, including shifts that rotate weekly, monthly, or according to custom patterns. An agent calendar administrator defines the calendar configuration, including individual user schedules and task visibility.

The automated conflict detection, the time zone holiday assignments, and the improved holiday visibility across calendars assist the managers and agents to plan more effectively and reduce scheduling errors which helps to maintain operational consistency through a modern, intuitive experience.

Scheduling Adjustments & Conflict Management:

Managers and agents benefit from a system that automatically adjusts or hides shifts falling on holidays, reducing manual intervention. They can receive real-time warnings when creating, editing, or swapping shifts on holiday dates, ensuring conflicts are identified and resolved early. While manual overrides remain available for special cases, proactive alerts and impact previews make conflict management clear, efficient, and reliable.

Floating Time zone Support:

Floating time zone support ensures that holidays reflect each agent's local time zone. When enabled, the system automatically applies holiday dates according to individual agent time zones, providing accurate scheduling for distributed teams. By enabling floating timezone, agents always see the correct holiday information, and managers maintain visibility into holiday impacts across regions.

Holiday Visibility in Calendars:

Managers and agents can easily view shifts and holidays in unified team and personal calendars, with support for location-based filters. The system automatically removes holiday assignments when a location-level schedule is deleted, ensuring data remains accurate and schedules stay consistent.

Location-based Holiday Calendar Management is supported by schema updates—including a new location field in the **Location Schedule** (sn_shift_planning_location_schedule) table—and enhancements across APIs and UI components. The solution is optimized for performance, accessibility, and seamless integration with existing Workforce Optimization and Scheduling modules, ensuring a scalable and reliable experience.

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Configure Location Based Holiday Calendar

Create location-based holiday calendars that align regional holidays with fixed or rotating shifts, enabling accurate workforce scheduling and reduced manual effort.

Before you begin

Role required: admin

About this task

Location#based holiday calendars streamline workforce scheduling by aligning regional holidays with fixed and rotating shift patterns, enabling accurate shift planning and reduced manual effort. Administrators can configure user schedules, rotations, and task visibility to support diverse work arrangements. For example, U.S. Holidays, British Holidays, and Australian Holidays. For example, U.S. Holidays, British Holidays, and Australian Holiday.

Procedure

1. Navigate to **All** > **Location Schedules** and perform one of the following actions:

Option	Description
Create a configuration from an existing event configuration	○ Select the desired configuration. ○ Right-click the form header and select Insert and Stay. A copy of the selected event type configura tion is created.
Create a new event configuration	Select New to create new holiday event.

2. On the form, fill in the fields:

Name	Enter a name for the holiday event
Time zone	Choose one of the following options: ○ Fixed: The holiday occurs at the same time for all agents ○ Floating: The holiday adjusts to each agent's local time zone
Application	The current scope in which the record is created
Description	Provide the description of the holiday schedule
Location	Provide the location for which this schedule is applicable

3. Perform one of the options:
   - If you created the configuration from an existing configuration, select **Update**.
   - If you created a new configuration, select#**Submit**.

To delete a holiday events follow the below steps:

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4. Navigate to**All** > **. Shift Planning** > **Event Configuration**, and open the Holiday Event type.
5. In the **Evaluate access for exclusion** > **Holiday – Any WFO User**, set the Delete option to false. The holiday event is removed from the agent's holiday calendar.

Assignment workbench overview

The assignment workbench enables customer service managers to assign tasks to agents efficiently and intelligently. The workbench uses configurable criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking. Managers can view these results and click one button to assign a task.

The assignment workbench displays all the relevant information for task assignment, including:

- A list of the agents in the task assignment group.
- The matching criteria used to evaluate the agents.
- An overall ranking for each agent in the assignment group.
- A filter with the current assignment group and the skills identified for the task, including any mandatory skills.

Agents are ranked from 1 to any number based on the criteria configured for the workbench. The more criteria that matches, the higher an agent's rank. When the criteria for two agents is the same, the agents have the same rank. Point to an agent's rank to display the details.

Use the filter to change the assignment group and to add or remove skills. Changes to the assignment group or to the skills lists are reflected immediately in the workbench:

- Changing the assignment group displays a different list of agents.
- Adding or removing skills can change the agent ranking.

If you are using the mandatory skills feature, the agents displayed in the assignment workbench are filtered by the skills in the **Mandatory Skills Added** list and then ranked by the other matching criteria.

Note: Agents cannot add or remove mandatory skills or make a skill not mandatory.

Configuring the assignment workbench

The assignment workbench configuration is stored in a matching rule that is based on the **Selection criteria** matching type. The default configuration uses the **Recommendation for Case Assignment** matching rule, which includes three of the four default matching criteria:

- Availability Today
- Matching Skills
- Assigned Cases

Based on these matching criteria, the workbench calculates and displays an overall rank for each agent in the group. You can modify or create matching criteria and the **Recommendation for Case Assignment** matching rule as needed or you can create your own configuration following these steps:

1. Create one or more matching criteria.
2. Create a matching rule with the **Selection criteria** matching type.
3. Open the matching rule and add the desired matching criteria.

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If you are using mandatory skills, you must replace the **Matching Skills** criterion in this matching rule with the **Matching Skills - Mandatory Skills Support** criterion to match agents with mandatory skills required for a case.

Using the assignment workbench

Access the assignment workbench by clicking the Find Agents icon next to the **Assigned to** field on the task form.

> **Note:** The state of the current record determines the availability of the Find Agents icon. The icon is available for records in the **Open**, **Awaiting**, and **Cancelled** states, and if the user has write access for the **Assigned to** field. The icon is not available for records in the **New** or **Closed** states or when the **Assigned to** field is read-only for the current user.

Sort the list of agents by any of the matching criteria by clicking the desired column header, which reorders the suggested agents based on the selected criteria.

Select a different assignment group from the **Group** list in the filter. The list of agents is updated based on the selection. If the selected group does not contain any agents, a message is displayed to select another group.

Add or remove skills from the **Skills** list in the filter. These selections are reflected in the **Matching Skills** column.

Skills that have been identified as mandatory for a task are displayed in the **Mandatory Skills Added** list. These selections are also reflected in the **Matching Skills** column. You cannot add or remove skills from this list.

Select an agent and click **Assign** to assign the task. The workbench closes and returns to the Case form. The **Assigned to** field is updated with the selected agent. Click **Save** on Case form to save this assignment.

Plugins

The Assignment Workbench plugin (com.snc.assignment_workbench) is activated as part of Customer Service Management.

The Case Assignment Workbench Demo plugin (com.snc.case_assignment_workbench_demo) provides demo data for the workbench.

Tables

Assignment Workbench adds the following tables.

Assignment Workbench tables

Table	Description
Matching Criteria [matching_dimension]	Stores the matching criteria that can be used to create a configuration for the assignment workbench.
Select Criteria [matching_dimension_for_assignment]	Stores the matching criteria for an assignment workbench configuration matching rules.
Matching Rule	Stores matching rules, including the matching rules that configurations for the assignment workbench.

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Assignment Workbench tables (continued)

Table	Description
[matching_rule]	

User Roles

Assignment Workbench adds the following roles.

Assignment Workbench roles

Role title [name]	Description	Contains roles
Assignment workbench [assignment_workbench]	Provides access to the assignment workbench for customer service agents and consumer service agents.	Skill user [skill_user]

Properties

Assignment Workbench adds the following properties.

Assignment Workbench properties

Property	Description
assignment_workbench.find.agents.title	Title for the macro button. • **Type**: string • **Default value**: Find Agents • **Location**: **Routing and Assignment** > **Properties**
assignment_workbench.new.window	When enabled, opens the assignment workbench in a new window. • **Type**: true | false • **Default value**: false: • **Location**: **Routing and Assignment** > **Properties**
assignment_workbench_no_of_agents	Number of agents per page. (To get better performance, do not use more than 50 agents per page.) • **Type**: choice list • **Default value**: 30 • **Location**: **Routing and Assignment** > **Properties**

Related topics

Configure assignment workbench

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Assign a case from the assignment workbench

Users with the customer service manager role can assign a case to an agent from the assignment workbench.

Before you begin

Role required: sn_customerservice_manager

About this task

Note: The Find Agents feature is available only in the classic environment.

Procedure

1. Open a customer service case.
2. Select the Find Agents icon ( ) next to the **Assigned to** field to open the assignment workbench.
   If the case has an **Assignment group**, the agents from that group are listed on the workbench. If the case doesn't have an assigned group, no agents are displayed.

   Note: The state of the current record determines the availability of the Find Agents icon. The icon is available for records in the **Open**, **Awaiting**, and **Cancelled** states, and if the user has write access for the **Assigned to** field. The icon isn't available for records in the **New** or **Closed** states or when the **Assigned to** field is read only for the current user.

3. **Optional:** Select an assignment group from the **Group** list.
   The list of agents updates based on the selected group.
4. **Optional:** Add or remove skills from the **Skills** list.
   The selected skills appear in a list below this field. The **Matching Skills** column updates to reflect the selected skills.

   Note: Mandatory skills can't be changed.

5. **Optional:** Sort the agents by selecting the column header for the desired matching criteria.
6. Select an agent by enabling the check box by the agent's name and then select **Assign**.
   The assignment workbench closes and the name of the selected agent appears in the **Assigned to** field on the Case form.
7. Select **Update** to save the agent assignment.

Related topics

Assignment workbench overview

Matching criteria for case assignment

The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking.

There are three types of matching criteria:

- **Simple Match**: Creates one-to-one matching, such as matching the time zone of an agent with the time zone of a task location.
- **Aggregate**: Uses a simple query and returns an aggregate result. For an aggregate type, select a table and create a filter, and then select an aggregate field such as the **Assigned to** field. This type of query returns a set of users.
- **Scripted**: Uses a scripted query which returns a list of users.

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Several matching criteria are provided with the assignment workbench:

- **Availability Today**: Availability is calculated based on the agent's work schedule, assigned work, and personal time off. The more availability an agent has, the higher the contribution to the agent's overall rank.
- **Matching Skills**: The number of agent skills that match the skills required for the case. The more skills that match, the higher the contribution to the agent's overall rank.
- **Matching Skills - Mandatory Skills Support**: Calculates the number of agent skills that match the mandatory skills. The calculation is done by filtering out all agents who don't have the mandatory skills and ranks the remaining agents. The more skills that match, the higher the contribution to the agent's overall rank.

  Note: If using the mandatory skills feature, use the **Matching Skills - Mandatory Skills Support** criterion to match agents with the mandatory skills identified for a case.

- **Assigned Cases**: The number of cases already assigned to this agent. The more cases assigned, the lower the contribution to the agent's overall rank.
- **Last Assigned**: To balance assigned work, prioritize the agent based on their last assigned work.

To create matching criteria, select the type and use the fields related to that type to build the query. After creating matching criteria, you can create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.

As part of selecting the matching criteria for the workbench configuration, you can specify the following settings for each individual criterion:

- ranking and display usage
- ranking method
- ranking weight
- threshold
- active/inactive

Ranking and display usage

In the **Use for** field, specify how you want that matching criterion to be used:

- Ranking and display: Uses the criterion to determine agent ranking and displays it in a column on the workbench.
- Display only: Displays the criterion in a column on the workbench but doesn't use it to determine agent ranking.
- Ranking only: Uses the criterion to determine agent ranking but doesn't display it on the workbench.

Ranking method

There are two ranking methods:

- More is better: For example, more availability is better when determining the agent ranking.
- Less is better: For example, fewer assigned cases are better when determining agent ranking.

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Weight

Each matching criterion has an assigned weight. By default, the matching criteria in the **Recommendation for Case Assignment** matching rule have an assigned weight of 10. You can assign a higher weight to the criteria that are more important.

Threshold

A threshold sets a minimum requirement for a criterion. For example, set the threshold of the Matching Skills criterion to 3 if you want to see only those agents who have at least three of the required skills for a task. For availability, set the threshold to the desired number of hours to display only those agents who have that minimum number of work hours available. You can set the threshold in the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Threshold** column.

Active/Inactive

There can be several matching criteria associated with the matching rule that determines the assignment workbench configuration. Each individual criterion can be set to active or inactive. Changing this setting has an immediate impact on the agent ranking. You can change the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Active** column.

Calculating the agent ranking

The assignment workbench adds the values of the matching criteria and their respective weights and uses these values to determine the overall agent ranking.

1. Calculate a number for each criterion.
2. Multiply that number by the criterion weight.
3. Divide the result by the total of all criterion weights.
4. Repeat for each criterion and add the results.

The following example shows how the ranking is determined for an agent with these matching criteria values:

- Matching Skills with Mandatory Skills Support: 5/6
- Availability Today: 7 hours
- Assigned Cases: 2

Calculations:

- **Matching Skills**: `2 / 3 = 0.666` (with 3 being the maximum number of skills)
- **Availability Today**: `7 / 8 = 0.875` (with 8 being the maximum number of hours)
- **Assigned Cases**: `2 / 26 = 0.0769` (with 26 being the total number of tasks in the table)
- **Weight**: Each matching criterion has an equal weight of 10

```
((0.666 x 10) / Total of criterion weight (10+10+10)) + ((0.875
 x 10) / Total of criterion weight (10+10+10)) + ((0.0769 x
 10) / Total of criterion weight (10+10+10))
```

```
(6.66 / 30) + (8.75 / 30) + (0.769 / 30)
```

```
0.222 + 0.291 + 0.0256 = 0.53
```

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This calculation is performed for each agent in the assignment group. Agents are ranked based on the value of this calculation, with the highest number earning the highest ranking.

Matching rules for case assignment

Use a matching rule to create a configuration for the assignment workbench.

The assignment workbench configuration is stored in a matching rule that is based on the **Selection criteria** matching type.

The default configuration uses the **Recommendation for Case Assignment** matching rule, which uses three of the four default matching criteria:

- Availability Today
- Matching Skills
- Assigned Cases

Note: If using the mandatory skills feature, use the **Matching Skills - Mandatory Skills Support** criterion to match agents with the mandatory skills identified for a case.

You can customize this matching rule to meet your specific need for calculating agent recommendations. This matching rule can also be used for auto assignment if you create an assignment rule.

Manage special handling notes

Get critical information about specific customers and empower agents in delivering personalized and efficient service with special handling notes.

Use the Special Handling Notes application to generate notes that highlight crucial information about individual records, like case or account records, ensuring users are well informed. For more info, see Special handling notes

Manage special handling notes

Create a special handling note	Create a special handling note for a record, such as a customer service case.
Update a special handling note	Update a special handling note for a record.
Delete a special handling note	Delete a special handling note for a record.
Delete a special handling note from a form	Delete a special handling note for a record from the Special Handling Notes list on the form.

Create a special handling note

Create a special handling note for a record, such as a customer service case.

Before you begin

Role required: sn_shn.admin or sn_customerservice_manager

About this task

Use special handling notes to highlight important information about individual records, such as a case or account record.

You can create special handling notes from the Special Handling Notes module in the application navigator or from a record that has been configured to use special handling notes.

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Important: While this feature provides the flexibility to create complex conditions, it is recommended that you keep the configuration simple and use dot walking sparingly. Creating complex conditions for special handling notes can affect the load time.

Procedure

1. Perform one of the following actions.
   - **CSM Configurable Workspace**: Navigate to the desired form, select the More actions menu in the record header and then select **Special Handling Notes**.
   - **Core UI**: Navigate to the desired form and select the **Create Special Handling Notes** related link. You can find these links in the Related Links section at the bottom of the form.
   - Navigate to **All** > **Special Handling Notes** > **Special Handling Notes** and select **New** in the Special Handling Notes list form header.
2. Fill in the fields, as necessary.

Special Handling Notes form fields

Field	Description
Short Description	A brief description of the note which is displayed in the Special Handling Notes list.
Message	The detailed content of the note.
Display as pop-up alert	Displays this note in the Special Handling Notes pop-up window.
Type	The type of special handling note: ○ **Standard**: Create a note for a specific record, which you select in the **Related record** field. ○ **Conditional**: Create a note for multiple records which meet certain conditions. Select a **Table name** and then create **Conditions**.
Priority	The priority of the note: ○ 1-Critical ○ 2-High ○ 3-Moderate ○ 4-Low
Status	The status of the special handling note: ○ **1-Active**: The note is active and appears in the Notes list or pop-up window. ○ **2-Inactive**: The note is inactive and does not appear in the Notes list or pop-up window. Inactive notes are removed from the Notes list but can be seen by navigating to **Special Handling Notes** > **Special Handling Notes**. ○ **3-Expired**: The note has reached its expiration date.
Effective immediately	Check box to make the special notes effective immediately. The status is set to **1 -Active**. Deselect this check box to display the **Effective on** field.

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Field	Description
Effective on	The date on which the special notes become effective. Enter a date for the special notes to become effective and click **Update**. The status is set to **2 - Inactive** until the date is reached.
Expires on	The date on which the note expires. Select a date from the calendar and click **Save**. The **Deactivate Special Handling notes** scheduled job runs daily at midnight and checks all active alerts. If the notes have reached their expiration date, it sets the status to **Expired**. The **Deactivate Special Handling notes** scheduled job also checks the **Effective on** field. If the status is active or inactive and the expiry date has been reached, it sets the status to **Expired**. If the status is inactive and the effective on date has been reached, it sets the status to **Active**.
Related record	The record for which this note is created. This field appears when you select **Standard** in the **Type** field. If you access this form from the **Create Special Handling Notes** related link, the record number is automatically filled in. To select a record, select a **Table name** and a **Document** from the pop-up window. The tables available for selection have been configured to use special handling notes.
Table name	The table that stores the entity for which the note is being created. This field appears when you select **Conditional** in the **Type** field. The default is the first table which has been configured to use special handling notes. After you select a table, a link is displayed with the number of matching records. This link is updated after you select one or more conditions. Click the link to display these records in a list.
Conditions	This field appears when you select **Conditional** in the **Type** field. Use the buttons in this field to build one or more conditions on the selected table. A condition is made up of a selected field, an operator, and a value. Add conditions using the **AND** and **OR** buttons. Delete conditions by clicking the **Delete** button to the right of a condition.

3. Click **Submit**.

Related topics

Special handling notes

Update a special handling note

Update a special handling note for a record.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, sn_shn.editor, or sn_shn.admin

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About this task
Users with the sn_customerservice_manager role can update a special handling note for a record if they can update a record for the underlying table.

Procedure
1. Navigate to **All** > **Special Handling Notes** > **Special Handling Notes**.
   You can also update a note from the Special Handling Notes list on a form.
2. In the Special Handling Notes list, click the note to be updated.
3. Make any necessary changes to the fields on the Special Handling Notes form.
4. Click **Update**.

Delete a special handling note

Delete a special handling note for a record.

Before you begin
Role required: sn_customerservice_manager or sn_shn.admin

About this task
Users with the sn_customerservice_manager role can delete a special handling note if they can delete a record for the underlying table.

Procedure
1. Navigate to **All** > **Special Handling Notes** > **Special Handling Notes**.
   You can also delete a note from the Special Handling Notes list on a form.
2. In the Special Handling Notes list, click the note to be deleted.
3. Click **Delete**.

Related topics
Special handling notes

Delete a special handling note from a form

Delete a special handling note from a form

Delete a special handling note for a record from the Special Handling Notes list on the form.

Before you begin
Role required: sn_customerservice_manager or sn_shn.admin

About this task
Users with the sn_customerservice_manager role can delete a special handling note if they can delete a record for the underlying table.

Procedure
1. Navigate to an entity form.
2. In the Special Handling Notes list, click the red **X** to the left of the desired note.
   Initially, the note remains in the Special Handling Notes list and the text of the note is crossed out. The note is removed from the list after the form is saved.
3. Click **Update**.

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Related topics

Special handling notes

Delete a special handling note

View team members assigned to an account

View the team members for a specific account.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager
- sn_crm_account_relationship_data_manager
- sn_crm_consumer_relationship_data_manager
- sn_crm_consumer_data_manager
- sn_crm_account_data_manager
- sn_customerservice_agent
- sn_customerservice_manager
- admin

Procedure

1. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **Partners**.
2. Select an account.
3. Select the **Account Team Members** related list.
   This list displays the employees who have been assigned to the team as well as their responsibilities.

Add an agent to the chat support assignment group

Agents must be added to the chat support assignment group before they can receive chat requests. This assignment group is used by the Customer Service Management chat communication channel to route chat requests.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **Customer Service Support**.
3. In the **Group Members** related list, click **Edit**.
4. Select the agents that you want to receive chat requests, and move them to the **Customer Service Support** group members list.
5. Click **Save**.

Related topics

Connect Support

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Approve a service contract

Approve a service contract for a customer account.

Before you begin

Role required: sn_customerservice_manager or admin

Procedure

1. Navigate to **All** > **Self-Service** > **My Approvals**.
2. Select a contract for review from the Approvals list that has a state of **Requested**.
3. Review the contract details in the summary at the bottom of the approval form.
4. Add review comments to the **Comments** field.
5. Click one of the following options.

Option	Description
Approve	The review state changes to **Approved** on the Approvals list.
Reject	The review state changes to **Rejected** on the Approvals list. If you reject a contract, you must enter a rejection reason in the **Com ments** field.

Related topics

Contract Management

Outsourced Service Provider manager tasks

Manage various tasks as an Outsourced Service Provider (OSP) Manager, including onboarding Outsourced Service Provider agents, viewing unassigned cases, and assigning cases to groups or agents under your supervision.

Some key functions that outsourced service provider managers can perform include the following.

Outsourced service provider manager tasks

Onboard an Outsourced Service Provider agent	An OSP manager can onboard OSP agents to manage and fulfill cases.
Assign a case to an OSP agent	As an Outsourced Customer Service external manager you can assign a case to an agent under your group.

Onboard an Outsourced Service Provider agent

An Outsourced Service Provider (OSP) manager can onboard OSP agents to manage and fulfill cases.

Before you begin

Role required: sn_csm_ocs.ext_manager

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Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Onboard Agent**.
2. Fill in the fields on the Onboard Outsourced Service Provider agent or manager form, as appropriate.

Option	Description
First Name	The first name of the agent.
Last Name	The last name of the OSP agent.
User ID	A unique ID for the OSP agent.
Email	The OSP agent's email address.
Mobile Phone	The OSP agent's mobile phone number.
Business Phone	The OSP agent's business phone number.
Assignment Group	Select the group to which you belong.

3. Click **Submit**.

   Note: Once onboarding is complete, a password reset email is sent to the agent's email address.

Assign a case to an OSP agent

As an Outsourced Customer Service external manager, you can assign a case to an agent under your group.

Before you begin

Note: The outsourced customer service external managers [sn_csm_ocs.ext_manager] can perform their designated tasks using the Core UI as workspaces are not currently supported.

Role required: sn_csm_ocs.ext_manager

Procedure

1. Navigate to **All** > **Outsourced Customer Service** > **Cases** > **Unassigned**.
2. Open a case.
3. Enter the name of the agent in the **Assigned to** field and select the agent from the list displayed.

   You can also click the Lookup using list icon ( ) and select the agent.

   Note: The **Assignment group** field is pre-populated with the group name. The list of agents belonging to that group is displayed when you lookup.

4. Click **Update**.

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Workforce Optimization for Customer Service

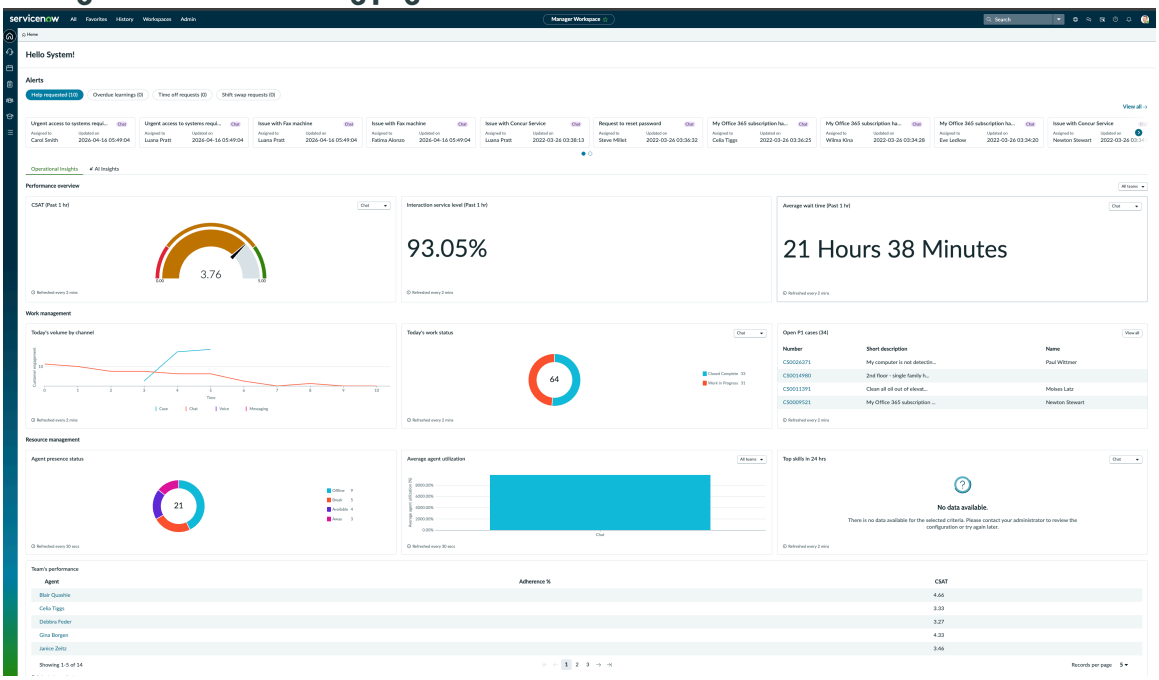
Enhance the quality and efficiency of your teams using channel management capabilities, smart scheduling, team structure, and real-time refreshing single scores. Monitor chat conversations and help agents on cases. Assess the quality of tasks completed, recommend skills for agents, and train them to address skill gaps.

Manager Workspace landing page

The Manager Workspace landing page provides managers with real-time alerts and key metrics that reflect the overall health and performance of the organization. By consolidating work and resource management data, managers can effectively oversee team performance, optimize agent utilization, and drive continuous improvement.

The Manager Workspace landing page showcases the various available widgets.

Manager dashboard landing page



The landing page provides the real-time data of the current workload and the team performance.

Alerts on the Manager Workspace landing page

Alert	Description
Help requested	View the help requests from agents and act on them. **Help requested** can be viewed on the **Manager Workspace landing page** and in **Conversation Monitoring** list view. Analyze the help requested interactions segmented by different channels, such as **Chat**, **Email**, **Messaging**, **Phone** and **Video**. This feature improves visibility into ongoing challenges, facilitating quicker responses to team members and improving collaboration.
Overdue learnings	View the training tasks that remain incomplete past their deadlines. This feature helps you to identify training gaps and verify timely skill development.

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Alerts on the Manager Workspace landing page (continued)

Alert	Description
Time off requests	List of submitted time-off requests pending for approval. This feature helps in managing employee leave, making it easier to plan and coordinate within your team.
Shift swap requests	Access the submitted shift swap requests to approve, reject, or add comments as needed. Once a request is approved or rejected, it's removed from the list. This feature enables you to handle shift swap requests effectively.

Key metrics on the Manager Workspace landing page - Performance overview

Key metrics	Description
CSAT (Past 1hr)	Review customer satisfaction (CSAT) scores across various channels, including case, chat', voice and messaging. Additionally, you can filter CSAT by teams. This feature enables you to analyze customer feedback and improve service.
Interaction service level (Past 1hr)	Displays service level of customer interactions. This feature helps identify improvement areas and enhances overall service quality, resulting in increased customer satisfaction.
Average wait time (Past 1hr)	Monitor the average wait time for customer interactions across various channels, including voice, case, chat, and messaging. This feature helps you identify trends and make informed decisions to improve service efficiency.

Key metrics on the Manager Workspace landing page - Work management

Key metrics	Description
Volume by channel	Analyze the volume of interactions segmented by different channels, such as case, chat, voice, and messaging. This feature provides insights into customer engagement trends, helping you assess the resource needs.
Today's work status	Monitor the status of ongoing cases and interactions. This feature enables you to effectively track the progress ongoing work items.
Open P1 cases	Access the active priority 1 (P1) cases that require your immediate attention, listed with the longest-open cases first. Select **View All** to see all critical cases. This feature enables you to identify and address urgent issues.

Key metrics on the Manager Workspace landing page - Resource management

Key metrics	Description
Agent presence status	Check the current availability of your agents, indicating whether they're active, away, or offline. This feature helps you to monitor workforce engagement and optimize resource allocation for effective customer support.

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Key metrics on the Manager Workspace landing page - Resource management (continued)

Key metrics	Description
Average agent utilization	Track the current average utilization rate of agents to assess how effectively their time is spent on productive tasks. Additionally, you can also filter average utilization by teams. This feature helps you to balance your workload and optimize resource allocation.
Top skills in 24 hrs	View the most frequently utilized skills over the past 24 hours. This feature helps you identify high-demand skills and guide or plan training efforts.
Team's performance	View important metrics for individual team members, including agent adherence percentages and CSAT scores. This feature helps you evaluate each agent's contributions and confirms they meet scheduled commitments and customer expectations.

The Manager Dashboard includes Sentiment Analysis and Trending Topic widgets that give supervisors visibility into customer sentiment and agent performance.

The Manager Dashboard in Manager Workspace includes an **AI Insights** tab. This tab contains AI widgets that surface customer sentiment signals, trending interaction themes, and quality evaluations. The tab follows existing UI and loading standards, and its tab-switching behavior is consistent with current dashboard interactions.

Tabs and widgets

- **Operational Insights**: Provides existing operational widgets and retains current data sources and configurations. Uses UIB layout and handles no-data and error states gracefully.
- **AI Insights**: Shows AI widgets such as **Sentiment Analysis** and **Trending Topics** based on enabled capabilities. Shares global filters with overview and avoids performance impact. If the AI plugins are not installed, the AI tab does not appear.

  Access and governance: Access is role-based (`sn_mgr_dashboard.user`) and enforced through ACLs at the page, tab, and widget level. Unauthorized users do not see the dashboard in navigation, and APIs are protected. Role inheritance keeps additional manager records in sync with the primary manager's roles (sn_mgr_dashboard.user) and entitlements.

- **Sentiment Analysis Widget**: Provides a consolidated view of customer sentiment indicators, enabling supervisors to quickly gauge shifts in satisfaction and emerging pain points.
- **Trending Topics Widget**: Displays recurring themes from customer interactions, helping managers identify the root causes of service patterns or issues.

Manager dashboard availability and configurations

The Manager Dashboard provides manager insights across multiple configurations. You can manage the dashboard the same way they manage other channel-based experiences, ensuring consistent setup across products. UI Builder (UIB) components make the dashboard easier to reuse and extend.

The dashboard and its widgets are built using UIB components. You can add these components to Agent Workspace or Manager Workspace. Widgets appear only when the required capabilities are enabled, providing a consistent experience across configurations.

When Channel Management is used with the Manager Dashboard, managers can view:

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- Help Request alerts
- Operational Insights

These insights are not available when Channel Management is used without the Manager Dashboard.

Advanced configuration: When additional insights and analytics capabilities are enabled, the dashboard includes;

- A tab-based layout
- An AI-powered widgets for Customer Signals and Quality Management
- An Operations Insights tab with widgets such as Performance, Work Management, and Resource Management

The available widgets and tabs depend on which capabilities are enabled in the instance.

Related topics

Create Manager Workspace landing page

Use sentiment analysis dashboard

View trending topics dashboard

Workforce Optimization for Customer Service manager workspace landing page

Channel Management in Workforce Optimization for Customer Service

Channel management lets you monitor important metrics across different channels and queues, manage the work being done by your team members, and collaborate with them to solve complex issues for your end-customers.

Monitor the real-time health of your channels and queues by reviewing waiting customers, available agents, the work being done by your team members (or agents in your teams) and collaborate with them to solve complex issues faster.

The following channel management snapshots provide you with a quick overview of the real-time performance monitoring and drill-down capabilities.

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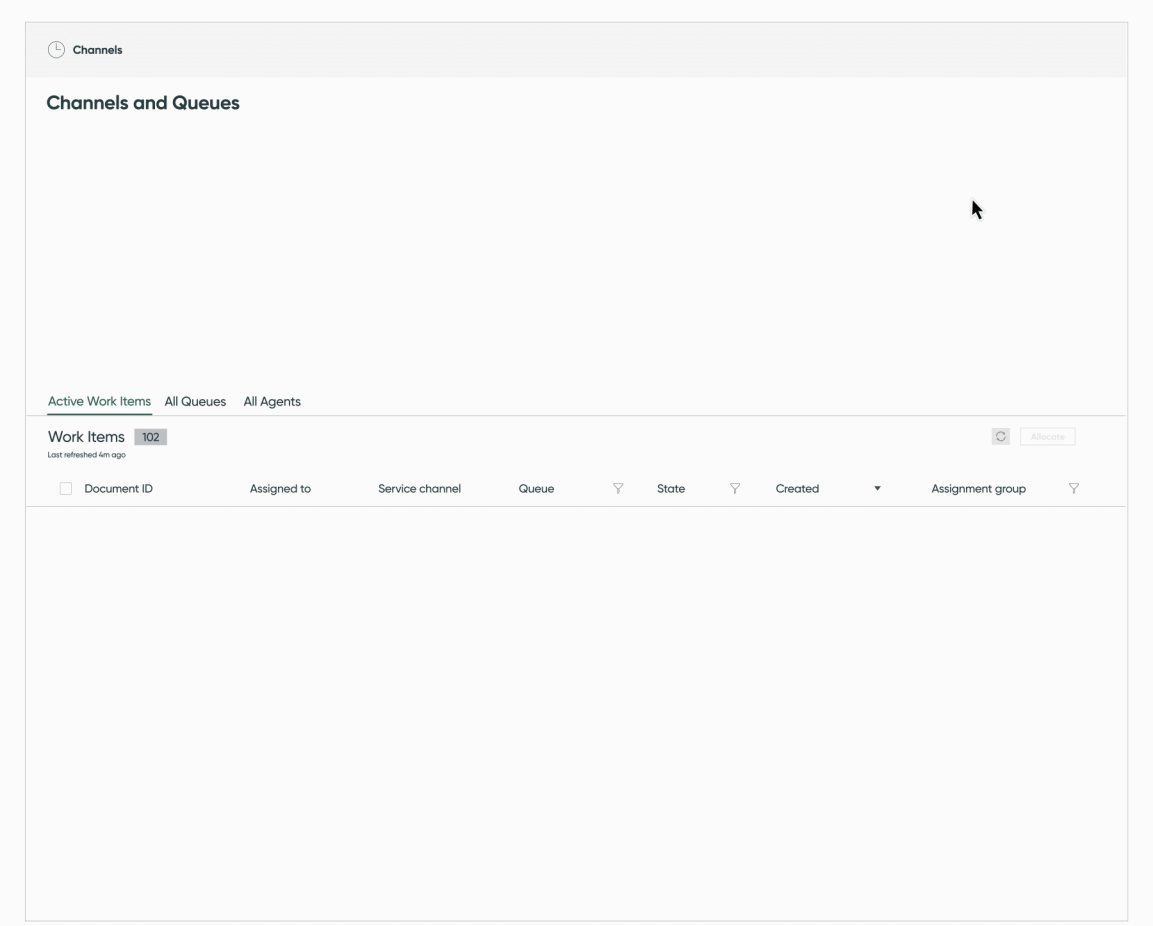

As a channel management user, you can:

- Track real-time performance of your teams using key performance indicator reports in service channels and queues.
- Review real-time performance as the team is actively working on tasks across channels and queues.
- Drill down on work items and jump in to provide timely help to team members via chat whisper or by adding work notes to a task.
- View agents' availability and their workload.
- Monitor pending work items in the queue and act when required.
- Assign work items manually to agents.
- Filter the applicable channels, KPIs, work items, queued work, and agents using the Assignment Group filter functionality.
- Track real-time performance of customer service on consumer messaging channels including WhatsApp, Facebook, LINE, Amazon Connect, and SMS.
- Track and change real-time presence of agents so that work items are routed more efficiently.
- Drill down the channel specific KPIs for further analysis.

As a channel management administrator, you can:

- Create service channels and queues.
- Associate assignment rules to queues.
- Configure KPIs for service channels and queues.

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- Configure the supervisor lists.
- Customize the channel management page according to your requirements using the UI Builder.

Help Request on the Channel Overview page

Help Request on the **Channel Overview** page helps the agents to raise requests both via chat and voice interactions directly. Display voice-based escalations from the NVC Active Call Component alongside chat requests to give supervisors a unified, real-time view of agent needs.

Supervisors can open any active voice request to review context and take action, including:

- Monitoring the live call
- Coaching the agent privately
- Barging in to speak with both the agent and customer

Each help request includes metadata such as agent name, interaction type, and duration, and updates automatically as new requests are raised. This capability requires CCaaS integration, appropriate supervisor permissions, and access to real-time interaction data, enabling faster response times, consistent support across channels, and an improved agent experience.

Example

Understand how you can monitor important metrics (or key process indicators) across different channels and queues. Manage the work being done by your team members (or agents in your teams) and collaborate with them to solve complex issues for your end-customers.

The example employee manages Customer Service operations for a large organization and has 12 teams. Each team has anywhere from 8 through 15 agents. The employee must ensure that incoming work gets effectively routed to the right groups across all channels. This can be done by setting up Advanced Work Assignment as per the business requirement.

Once the employee has configured Advanced Work Assignment (AWA) appropriately, they can add key performance indicators (KPIs) to the channels and queues, and monitor the operational performance of the teams in real time.

The employee in this example can then keep a track the teams' ongoing work, assign pending work items manually to agents, and join chat conversations to assist agents.

Get an overview on how you can monitor teams by looking at the real-time data in service channels and queues.

Get an overview on how you can manually assign work items, monitor ongoing cases, and join the chat conversations.

Get an overview on how managers can add service channels, queues, and configure KPIs.

Related topics

Setting up service channels and queues

Using Channel Management in Workforce Optimization for Customer Service

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Channel Management in Workforce Optimization for Customer Service

Use Channel Management to keep a track of the real-time performance of work done by your team members through channels and queues views. You can also drill down into specific cases and chats and collaborate with your team members to achieve better results.

Using Channel Management in Workforce Optimization for Customer Service

Route work items to assigned groups using channels. Use skill-based routing to ensure that the right work goes to the right agent. Review real-time performance as your team is actively working on tasks across channels. When you see escalations, you can help your agents resolve issues without the requester being aware of it.

Monitor ongoing work and track your agents' performance of your direct reporting teams and teams that you manage additionally. Work items are allocated to qualified agents using work item queues, routing conditions, and assignment criteria that you define.

Review real-time performance as your team is actively working on tasks across channels in the following sections.

- The **Overview** section displays the most important key performance indicators (KPIs) for each of the service channels in the form of cards. The KPIs appear as per the configuration order in the service channels. The KPI scores are real-time information and automatically refreshed at a regular interval of 5 seconds or as configured in the `sn_channel_mgmt.kpi_auto_refresh.interval.seconds` system property. Also, the service channel cards refreshes automatically in 2 minutes as configured in the `sn_channel_mgmt.channel_card_auto_refresh.interval.seconds` system property or you can manually refresh by clicking the Refresh ( ) icon.
- **Assignment Group** refines reports on all pages of channels and queues as per the groups selected. Interactive filter based on the assignment group configuration, you can select the assignment group on which you want to refine the data directly from the dashboard. You can disable the **Assignment Group** interactive filter using the `sn_channel_mgmt.filter_config.enable` system property.
- The **Queued Work** tab displays the active work interactions being done within each service channel and queues.
- The **All Queues** tab displays the list of work items from queue-based routing. You can drill into specific queues and see the active interactions, work items and agents. Track real-time performance of your teams using key performance indicator reports in service channels and queues. Respond to incoming support requests by changing queues as per the priorities.
- The **All Agents** tab displays your agents' ongoing work, presence statuses, channels, work load, and open capacity. You can drill into specific agents to view the agent's profile, ongoing tasks, presence state's history, and override channel capacity.

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Note:

- All lists display the real-time information and are automatically refreshed at a regular interval of 30 seconds or as set in the `sn_channel_mgmt.list_auto_refresh.interval.seconds` system property. You can also refresh the service channel cards manually by clicking the Refresh ( ) icon.
- The **All Queues** and **All Agents** lists offer a default sorting and filtering mechanism that lets you to view the records of the selected fields based on a default sort order. Click a column heading to toggle between ascending and descending order. The sorting order turns to the default configuration as you leave the page. Administrator can customize the default sort order by creating an implementation using the extension points. For more information, see Use extension points to configure the sort order.
- You will also receive an email notification of your agents' work summary at the end of each day if a scheduled report is configured.

Assist agents by joining their chat conversations with their end users

Assist agents in real time by joining their chat conversation and collaborate on any record by connecting with the right people instantly to achieve faster resolution.

Before you begin

Role required: sn_csm_wfo_workspa.manager

About this task

View the work-in-progress chat interactions and see if any of the agents has set the **Help Requested** flag as **Yes**. You can then open the interaction record and view all messages exchanged between the end user and agent, gain the context and choose to join the conversation by either sending private messages or joining the conversation in public.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Do one of the following:
   - Click the **Help Requested** indicator's score on the landing page.
   - Click the Channels ( ) icon, select a queue and then click the **Active Interactions** tab.
   - In the **Lists** page, click **Conversation Monitoring** > **Help Requested**.
3. Click the interaction record for which you want to join the conversation.
4. Click **Join Conversation** to start an interaction with the agent or click **Send Private Message** to send a private message only to the agent.

Result

A chat conversation is established.

Track and analyze the queue health

Monitor your agents' workload and the status of their work items against each service channel and queue so that you can get an idea of how efficiently work is moving through the queue and to your agents.

Before you begin

Role required: sn_csm_wfo_workspa.manager

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About this task

Track the real-time performance of each queue within your service channels. You can drill into specific queues so that you can see the real-time reports, waiting work items, available agents, and status of the ongoing work. This information can give you an idea of how efficiently work moves through the queue and to your agents. With this information, you can determine which queues are doing well and which queues could use a few more agents on board. For example, if you see lots of agents and not much work, you can recommend skills for your agents for other queues.

Note:

- The records in the list appear based on the column's default sort order. Click a column heading to toggle between ascending and descending order. The sorting order turns to the default configuration as you leave the page. For example, the **Available agents** column is by default in descending sort order. The administrator can change it to ascending order by creating an implementation using the *sn_channel_mgmt.ChannelMgmtExtensionPoint* extension point. For more information, see Use extension points to configure the sort order.
- The records in the list refresh at a regular interval of 30 seconds. The administrator can change the interval using the *sn_channel_mgmt.list_auto_refresh.interval.seconds* property.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Channels ( ) icon.
3. Click the **All Queues** tab.

Records for tracking agents' workload and status

Field	Description
Name	Queue name that was used to assign and route the work to the agent. Click to view the work items and agents that are associated with the queue.
Service Channel	Service channel name to which the queue is categorized. Click to view the work items and agents that are associated with the channel.
Waiting work items	Number of waiting work items in the queue.
Average wait time	Average amount of time that the work items are waiting for an agent.
Available agents	Number of available agents.
Agents not available	Number of non-available agents.
Work items assigned today	Number of work items that were assigned on a particular day.
Work items canceled today	Number of work items that were canceled on a particular day.

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Field	Description
Average Agent Utilization	Agent workload/capacity in percentage. The percentage is calculated from the **Total Capacity** and **Total Capacity in Use**.
Service Level	Number of work items that were accepted faster than the Queue's Target Wait Time.

Allocate work items manually to agents

Allocate pending work items to agents to complete the work.

Before you begin

Role required: sn_csm_wfo_workspa.manager

Ensure that the agent has the relevant skills, availability, and access to at least one queue in the service channel.

About this task

The active work items remain in the queue and are pending manual allocation for one of the following reasons:

- The agent has already reached the maximum capacity.
- Available agents have not accepted the allocated work items.
- Agents with required skills are not available.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Channels ( ) icon.
3. Select the work item using one of the following actions.

Navigate To	Do this
Queued Work tab	Select the work item.
Service Channel page	**a.** Click a service channel. For example, Chat. **b.** Click the **Work Items** tab. **c.** Select the work item.
All Queues	**a.** Click a queue. **b.** Click the **Work Items** tab. **c.** Select the work item.

The list of available agents appears with details such as presence state, availability, capacity, assignment groups (common groups between manager and agents), and matching skills.

Note: The availability hours are the current shift timings of an agent, excluding the break time. However, if the shift hasn't started, then the next shift available hours are displayed.

4. Select the agent that you want to assign the work item to.
   For example, if the capacity is 0/4, it means that the agent's maximum capacity is four work items.

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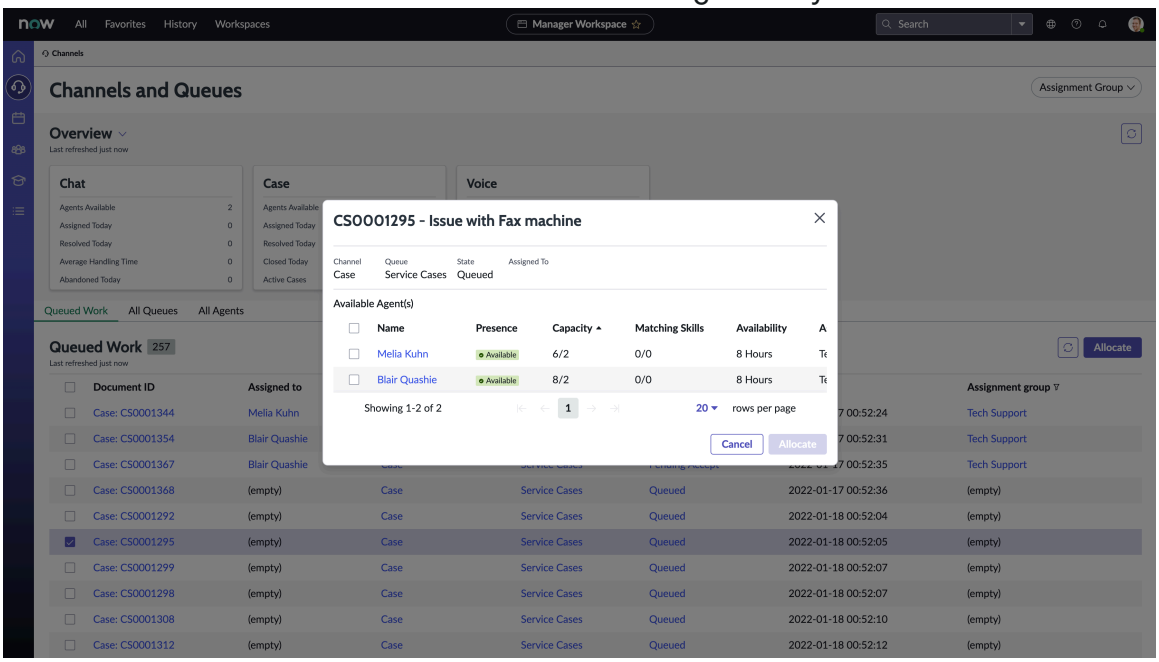
Note: You can allocate one work item at a time to the agent that you select.



5. Click **Allocate**.
   A confirmation message appears that shows that the work item is allocated to the selected agent. You can customize the confirmation message by adding the [glide.awa.manual_assignment_message] system property to the sys_properties.list [sys_properties] table. The agent gets an alert on the assigned work item as follows:
   - If the agent accepts the work item, the status changes from **Pending Accept** to the **Accepted** state. The **Assigned To** field is updated with the agent's name and the relevant KPI is updated.
   - If the agent rejects the work item, the status changes to the **Queued** state.
   - If the agent does not accept the work item for a long time, the status remains in the **Pending Accept** state. You then need to reallocate the work item.

Track and analyze agents' performance

Track your agent's performance in overview so that you can analyze and review how that agent is doing.

Before you begin

Role required: sn_csm_wfo_workspa.manager

About this task

View all agents and their real-time status. Drill down into a specific agent to view the following details.

- Real-time information of KPIs such as active cases, interactions, and other rejections.
- Override channel capacity.
- Agents' availability and their presence states' history.
- Work items which are in **Pending Accept** state.
- Interactions that are new, work in progress, and on hold states.
- Cases that are in new, open, and awaiting info states.
- Skill set, schedule, and profile.

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- Assigned training tasks.
- User details and groups assigned.

Note:

- The records in the list appear based on the column's default sort order. Click a column heading to toggle between ascending and descending order. The sorting order turns to the default configuration as you leave the page. For example, the agent's **Presence State** column is by default in ascending sort order. The administrator can change it to descending order by creating an implementation using the `sn_channel_mgmt.ChannelMgmtExtensionPoint` extension point. For more information, see Use extension points to configure the sort order.
- The records in the list refresh at a regular interval of 30 seconds. The administrator can change the interval using the `sn_channel_mgmt.list_auto_refresh.interval.seconds` system property.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Channels ( ) icon.
3. Click the **All Agents** tab.
4. Track and analyze agents' performance.

Field	Description
Agent	First and last name of the agent. Click the agent's name to view the agent's profile summary.
Service Channel	Agent's associated service channel, so you know what type of work the available agent can handle. Click the channel to view the list of work items.
Total Capacity	Number of maximum work items that can be automatically assigned to agents (pending overrides). ○ Chat: The default is 4. ○ Incident: The default is 2.
Capacity in use	Number of ongoing work items. Click the score to view the ongoing work of an agent.
Utilization	Agent workload/capacity in percentage. The percentage is calculated from the **Total Capacity** and **Capacity in Use**.
Presence State	Agent's current presence status. For example, Online or Offline.
Can Take Work	Agent's status to accept the work item.
Time in State	Amount of time the agent has been in the current presence status.

5. Select an agent to drill down to view the details.
   Agent profile page appears. The **Current Work** displays the data of the configured key performance indicators (KPIs). For more information, see Configure KPIs for agents.

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Override channel capacity for an agent

Change the default number of work items that an agent can handle for a service channel.

Before you begin

Role required: sn_csm_wfo_workspa.manager

About this task

By default, the override capacity is valid for 12 hours. Administrator can change the duration using the `sn_channel_mgmt.awa_agent_temporary_override_time.minutes` system property. The capacity resets to the previous value after the specified time. The scheduled job Reset Temporary Capacity Override is executed every two minutes to check the invalid or expired overridden capacity and resets to the previous value. You can override the channel capacity for a single agent at a time. Ensure that an agent to whom you want to override the channel capacity needs to be associated with Advanced Work Assignment and the required channels.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Navigate to an agent's profile page.

To set the override capacity	Do this
From Channels	**a.** Click the Channels ( ) icon. **b.** Click the **All Agents** tab. **c.** Click an agent's record.
From Teams	**a.** Click the Teams icon ( ). **b.** Click the KPI group. **c.** Select **Group Members** tab. **d.** Click an agent's record.

   The agent profile page appears.
3. Click the **Overview** tab.
4. In the **Channels** section, select the service channel for which you want to override the capacity.
5. Click **Capacity Override**.
   The **Agent Capacity Override** page appears.
6. In the **Override Capacity** field, enter the new capacity.
7. Click **Apply**.

Result

The following snapshot shows an example of an agent' capacity override.
A message appears indicating the capacity update is valid for the defined

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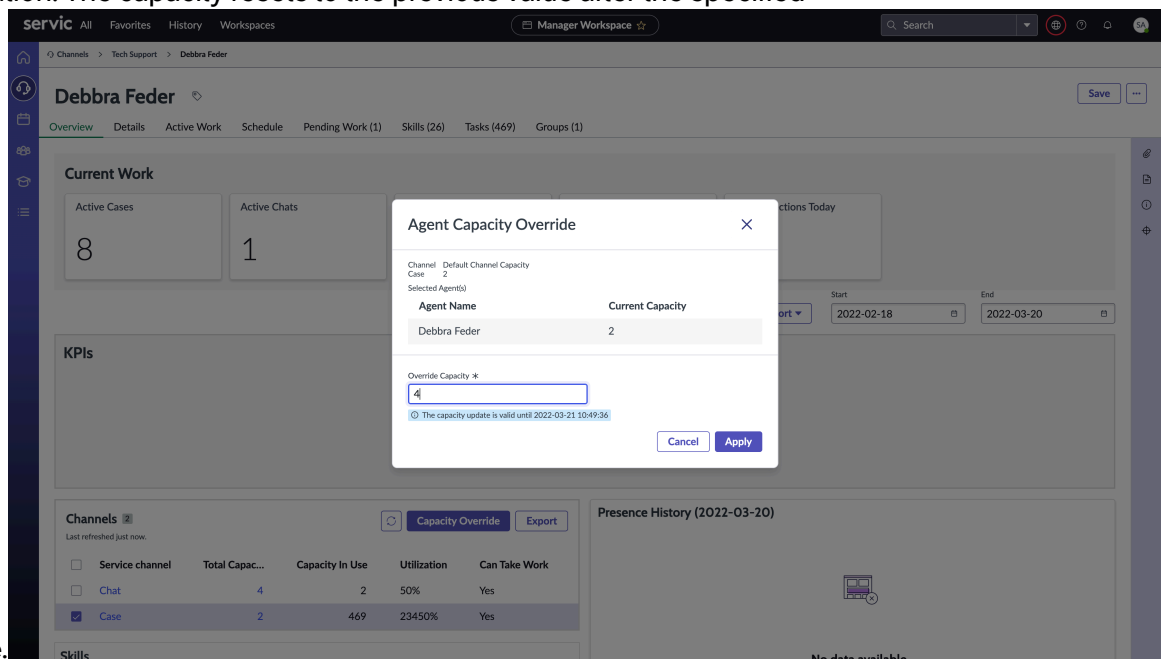
duration. The capacity resets to the previous value after the specified time.



Using Voice with Workforce Optimization for Customer Service

Use Voice to deflect cases away from your human agents using bots. You can record phone interactions when agents resolve issues. Also, you can monitor those interactions to evaluate and improve the quality of case resolutions.

With the Voice application, you can:

- Enable your workforce to work using the voice channel and get call recordings, call transcripts, and reports of sentiment analysis when agents interact with callers. You can visualize all of this information within the Channel Management application in Workforce Optimization for Customer Service.
- Analyze the call transcripts and sentiments of users after an interaction is complete so that you can create assessments, provide feedback, and training for agents.
- Synchronize agent presence within the queue.
- View the Amazon Connect channel on Channel Management. You can view the performance metrics and reports of the agents using the voice channel. To access the reports, your application administrator must install Amazon Connect Spoke.

  Note: The following reports on the Amazon Connect channel are chargeable:

  - Contacts in ACW State
  - Oldest Contact Age
  - Average Abandon Time

  These reports are collected from Amazon Connect using `GetMetricData` and `GetCurrentMetricData` APIs. For more information on the prices of these reports, see Amazon CloudWatch Pricing.

Note: You can integrate any third-party telephony service with the ServiceNowVoice application. By default, ServiceNowVoice provides you with the ability to integrate with the Amazon Connect application.

You can visualise the metrics from the Amazon Connect phone queues that are routed through Voice using the Channel Management application in Workforce Optimization for Customer

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Service. The Voice application uses Advanced Work Assignment to report data from the Amazon Connect queues.

Benefits of using Voice with Workforce Optimization for Customer Service

As a manager, you can:

- Monitor your agent's calls as they resolve customer issues.
- View synchronized agent presence states within the Channel Management application in Workforce Optimization for Customer Service.
- Assess your agents by reviewing recordings of agent interaction and call transcripts.
- Analyze sentiments from the call transcripts and use that to coach and train your agents.

As an agent, you can:

- Get information about the caller before you answer an incoming call.
- Analyze call transcripts and listen to recordings after you complete an interaction.
- Place outbound calls using automated outbound dialing.

Associate Amazon Connect queues for CSM to a ServiceNow instance

Set up phone queues for Amazon Connect to gain visibility into the queues using Workforce Optimization for Customer Service.

Before you begin

Enable the Advanced Work Assignment plugin (com.glide.awa) to create the Amazon Connect queues. You must activate this plugin before you activate the Cloud Call Center Core (sn_cti_core) plugin so that you can successfully integrate the two applications.

After you Install ServiceNow Voice applications, when you enable the Advanced Work Assignment plugin (com.glide.awa), the Amazon Connect (phone) service channel appears in the Workforce Optimization for Customer Service.

Role required: sn_csm_wfo_workspa.admin and sn_cti_amzn_cct.admin

About this task

After an agent completes a call, using Workforce Optimization for Customer Service, you can learn:

- Who was on hold and how long they were on hold
- How long calls are taking
- Which agents are available and when
- How many agents are available and what is their current utilization

You can see the Basic queue when you install the demo data with the sample contact flow:

Amazon Connect Phone Queues

Calls get routed to this queue	When
Basic Queue	An utterance is generic, such as, "I want to talk to an agent."
VIP Queue	A user who has the VIP field enabled calls Support.
IT Equipment Support	An utterance includes IT equipment support or hardware issues.
Application Support	An utterance includes application support.

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For example, the Basic queue is available when you install the demo data to get the calls routed to this queue when an utterance is generic, such as, "I want to talk to an agent".

A routing profile links queues to agents. Every agent must have a routing profile in the Amazon Connect instance that is integrated with the ServiceNow instance. For more information, see create a routing profile.

Note:

- You can associate each profile with multiple Amazon Connect agent queues.
- You must associate each of these agent queues with the corresponding agent queue in your ServiceNow instance using an Amazon Connect ARN number. This association enables you to report on queue statistics and call metrics within Workforce Optimization for Customer Service.

Procedure

1. Create placeholder queues for an Amazon Connect (phone) service channel if you need additional queues.
   For more information on creating the queue, refer to Create a work item queue.

   Note: Do not add work item routing conditions when you create the placeholder queues.

2. Associate the ServiceNow Advanced Work Assignment (AWA) queue record with the Amazon Web Services (AWS) queue ARN.
   a. In the Amazon Connect instance, navigate to **Routing** > **Queues**.
   b. Select a queue.
   c. Copy the ARN for the queue.
   d. In the ServiceNow instance, navigate to **Advanced Work Assignment** > **Queues** and select the corresponding queue.
   e. In the **Cloud Call Center Source ID** field, enter the ARN number.
   f. Click **Update**.
   g. Repeat these steps for each queue.
3. Add assignment groups to a queue.
   a. Select a work item queue.
   b. Click **Group Queue Priorities** related list.

      Note: You must configure the form to display this related list.

   c. Click **New**.
   d. In the **Group** field, add an assignment group that include agents who can handle this queue.
   e. In the **Order** field, select the order number for the assignment group. This is the order of assignment group priority in which the incoming calls are handled.
   f. Click **Submit**.

Listen, Monitor or Barge in to an agent call

Monitor your customer service agents' calls when they are resolving issues for external callers by using Workforce Optimization for Customer Service.

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Before you begin
Role required: sn_csm_wfo_workspa.manager

You must also have an active session with Amazon Connect and be able to monitor live conversations. For more information, refer to Monitor live conversations

Use Native Voice Controls (NVC) in Manager Workspace to open an active phone interaction and monitor, coach, or barge into an agent's live call, with the conversation panel displaying real-time transcription and call-control options that allow supervisors to silently monitor the call, whisper-coach the agent privately, or join the conversation directly; the UI clearly indicates the active mode, and supervisors can switch modes as needed and end the session at any time by disconnecting or closing the NVC utility panel, after which the supervisory session terminates automatically.

About this task
When the Amazon Connect application answers a call from an external source, an interaction record is created.

Procedure

1. Monitor your agent's call queue when an agent is talking to an external caller in Workforce Optimization for Customer Service.
2. Open the active interaction when the phone call is in progress.
3. Select one of the modes:
   - **Monitor** — You hear both the agent and customer; neither hears you.
   - **Coach** — Only the agent hears you (private whisper coaching).
   - **Barge In** — You join the customer-facing conversation; both the agent and customer hear you.
4. Assist the agent as needed, switching modes to match the situation.
5. End the session by selecting Disconnect or closing the NVC utility panel.

Analyze transcripts and sentiments for the Amazon Connect phone channel

Analyze your agent's call recordings, transcripts, and sentiment reports. With this information, you can assess the call quality and train your agents to handle calls better in the future.

Before you begin
Role required: sn_cti_core.user_manager

About this task
When an agent interacts with an external caller, the call gets recorded and transcribed. The application tags every statement within a transcript with a sentiment score. After a call has been completed, a sentiment report is automatically generated.

Note: The manager must have an active session with Amazon Connect to view the transcripts and sentiments. The transcripts and sentiments are generated in the Amazon Connect application. They are then displayed in the Channels application in Workforce Optimization for Customer Service.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select an interaction record to analyze transcripts and sentiments.

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To analyze call transcripts and sentiments	Do this
From Channels	**Note:** You can view call transcripts and sentiments for all interactions that were closed today. **a.** Click the Channels ( ) icon. **b.** Click **Amazon Connect (Phone)**. **c.** Select an interaction record.
From Teams	**a.** Click the Teams icon ( ). **b.** Select a team. **c.** Select a user. **d.** Select a KPI. **e.** Select an interaction record.
From Coaching	**Note:** When you have assessments triggered from calls, you can view call transcripts and sentiments for those interactions. **a.** Click the Coaching ( ) icon. **b.** Click the **Active Assessments** tab. **c.** Select an assessment.
From Lists	**a.** Click the Lists ( )icon. **b.** Select an interaction record.

3. Click **Call Analysis**.

   The Amazon Connect application generates the interactions and sentiment analysis of those interactions and displays them as a report in Workforce Optimization for Customer Service.

   In the CRM Workspace, agents use the **Call Analysis** tab to review calls, transcripts, and sentiment analysis. The recording playback widget is available if the agent's Amazon Connect security profile is configured to enable access to call recordings.

4. **Optional:** Analyze transcripts and sentiments for the Amazon Connect phone channel and assign training to coach the agents.

Analyze skills for your teams in Workforce Optimization for Customer Service

Add skills to groups and view skill assignments for your teams.

Before you begin

Role required: skill_admin

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon ( ).
3. Select a team for which you want to analyze skills.
4. Add a skill to the team.
   a. In the **Skills** tab, click **New**.
   b. Select a skill in the **Skill** field.
   c. In the **Skill level** field, select a level for the selected skill.
   d. In the **Inherited from** field, select the skill from which this skill is inherited.
   e. Click **Save**.
   You can click on a skill to analyze skill data such as the number of users or tasks with that skill, the overall skill coverage, and how many experts you currently have with that skill.

Assigning work using Work Scheduler in Workforce Optimization for Customer Service

Manage your teams' work assignments easily by customizing your work queue to display the most relevant work items.

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Gain insights into which agents have been recommended to work on a task based on the mandatory and optional skills they have.

Assign work based on your teams' skills and capacity

Plan your teams' work and assign work items such as incidents, problems, change requests, or interactions to them based on their skills, availability, and capacity. View your teams' shifts, events, and work assignments and assign or reassign the work items from a central location.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Note: Your administrator must add sys ids for event categories that you want to display in the calendar to the `sn_wfo_work_sched.shift_data_categories` system property. For more information, see Work Scheduler components in Workforce Optimization for Customer Service reference.

Role required: sn_wfo_work_sched.manager

About this task

Analyze the tasks that your agents are assigned to and their actual shift plans. If the agent doesn't work during the duration the task has to be completed, you can reassign the task based on agent availability.

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Note:

- Each type of task is displayed in the color defined in the queue configuration.
- You can enter keywords in the **Search** field in the sidebar to search a card.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the **Work Scheduler** icon.
   - You can view the work shifts of all of your agents for all teams you manage. When you select the shift, the pop-up displays the shift details such as the shift time span and agent break times.
   - In the contextual side panel, select the Filter icon ( ) and then select any filter, add the desired criteria, and select **Apply** to narrow down the display of the team members in the calendar. You can filter based on your team's assignment group, skills, location, schedule plan, or shift plan.
3. **Optional:** If you don't have any queue configurations in the Work scheduler, select the queue settings icon ( ) and then enable up to five work item types.
   The application creates a queue configuration and corresponding filters for each enabled work item type.
4. **Optional:** Create a queue configuration.

   a. Select **Queue configurations**.

   b. In the **My queue configurations** list, select **New**.

   c. On the form, fill in the fields.

Name	Description
Name	Name for the queue configuration.
Work configuration	The type of work configuration you want to use for the queue configuration.
Color	The work item color that displays in the calendar.
Order	The order number in which you want the queue configuration displayed in Work scheduler.
Matching rule	The matching rule for the work item type.

   d. Select **Save**.

5. Analyze your teams' work and schedule.

   a. From the **Queue** menu, select a work item to view related tasks.

   For example, if you select **Unassigned Incidents**, you can see all tasks related to the Unassigned Incident queue.

   You can select a time zone to view the agent schedule in that time zone.

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b. Analyze the tasks and work shifts for each agent in the calendar.
You can use the pagination to scroll through the work shifts.

6. Assign a work item to an agent.

a. Select a task that you want to assign to an agent.

When you enable the **Show suggested only** option, by default, you can choose to display team members based on their availability, skills, or time zone. The ranking of the team members are based on matching assignment rules set for each criteria. Work scheduler uses Assignment workbench to evaluate agents to work on tasks.

You can select one or more of these criteria and the ranking of the team members will be based on the selected criteria:

- **WFO - Availability**—The number of hours the team member is available.
- **WFO - Mandatory skills**— If the task has mandatory and optional skills associated with it, the work scheduler displays agents who have all of the mandatory skills first and then the agents who have the optional skills.
- **WFO - Optional skills**— If the task only has optional skills associated with it, then the list displays the agents with the optional skills.
- **WFO- Timezone overlap**—The delta between the task time zone and the user's time zone. For example, if the user is located in the Pacific time zone and if the task location is in the Eastern time zone, then it will display as **+3**; if the task location is Hawaii, then it will display as **-3**.

To add your own matching rule, see Create a criteria for a matching rule in Work scheduler.

All of these criteria are based on the **More is better** ranking method where a higher value is better. For example, when the WFO-Mandatory skills criteria is enabled, team members that have more skills that are mandatory to work on the work item will be ranked higher.

For each criteria, if there is 100% match, then the values are displayed in green color; if not, the values are displayed in yellow color. If all criteria match a 100% then the matching details are displayed in green color; if not, they're displayed in yellow color.

b. Select an agent from the work scheduler calendar to whom you want to assign the task.

c. Click and drag your mouse device for the time span on the calendar for which you want the agent to work on the task.
The task is assigned to that agent. You can also edit the duration of the time span or drag the time span and reassign the task to another agent.

> **Note:** From the work queue, when you select a task that has been assigned to an agent, the application auto-scrolls to the page that has the time span for the task and displays the schedule for the agent.

7. Optional: Update a work item from the calendar.

a. Select a desired task on the calendar that you want to update.

b. Select the Edit icon to access a work item record.

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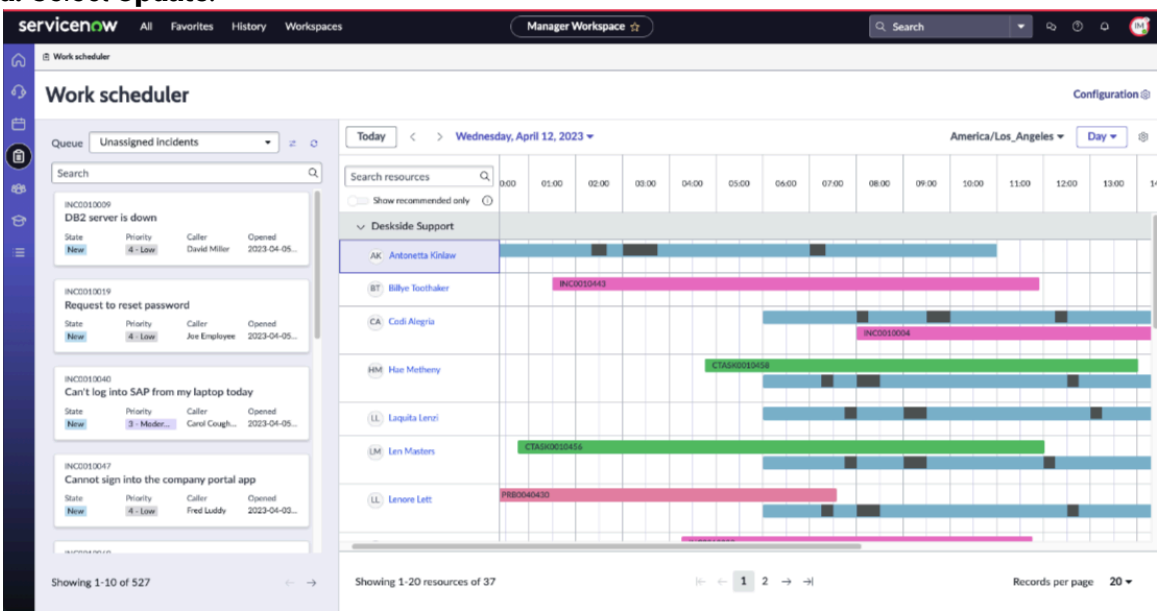
c. On the form, make the necessary updates.

d. Select **Update**.



Create a criteria for a matching rule in Work scheduler

Add a criteria for a matching rule to enable assignment of work items to team members based on the rule.

Before you begin

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Role required: admin

About this task

The following matching rules, which are available by default, are based on the selection criteria matching type:

Rule name	Work configuration name	Table	UX app route
Incident Matching rule	Incidents	Incident [incident]	Incident
Problem Matching rule	Problems	Problem [problem]	Problem
Requested item Matching rule	Requested items	Requested Item [sc_req_item]	Requested item
Request Matching rule	Requests	Request [sc_request]	Request
Catalog Task Matching rule	Catalog Task	Catalog Task [sc_task]	Catalog task
Change Request Matching rule	Change Request	Change Request [change_request]	Change requests

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Rule name	Work configuration name	Table	UX app route
Change Task Matching rule	Change Task	Change Task [change_task]	Change task

For information on how matching criteria works, see Matching criteria for work items in Work scheduler.

The following four criteria are available by default:

- WFO-Mandatory skills
- WFO-Availability
- WFO-Optional skills
- WFO-Timezone overlap

Procedure

1. Navigate to **All** > **Work scheduler** > **Matching Rules**.
2. In the Matching Rules list, select a matching rule; for example, the **Incident matching rule**.
3. In the Select Criteria related list, select **New.**
4. Fill in the fields on the form.
   For information on creating a new matching criteria, see Create assignment workbench matching criteria.
5. Select **Submit**.

Matching criteria for work items in Work scheduler

The assignment workbench uses configurable matching criteria, such as skills and availability, to evaluate the agents in a selected group and provide an overall ranking.

> **Important:**
>
> Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

There are three types of matching criteria:

- **Simple Match**: creates one-to-one matching, such as matching the time zone of an agent with the time zone of a task location.
- **Aggregate**: uses a simple query and returns an aggregate result. For an aggregate type, select a table and create a filter, and then select an aggregate field such as the **Assigned to** field. This type of query returns a set of users.
- **Scripted**: uses a scripted query which returns a list of users.

Several matching criteria are provided with the assignment workbench:

- **Availability Today**: Availability is calculated based on the agent's work schedule, assigned work, and personal time off. The more availability an agent has, the higher the contribution to the agent's overall rank.
- **Matching Skills**: The number of agent skills that match the skills required for the incident. The more skills that match, the higher the contribution to the agent's overall rank.

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- **Matching Skills - Mandatory Skills Support** Calculates the number of agent skills that match the mandatory skills. It does this by filtering out all agents who do not have the mandatory skills and ranks the remaining agents. The more skills that match, the higher the contribution to the agent's overall rank.

  Note: If using the mandatory skills feature, use the **Matching Skills - Mandatory Skills Support** criterion to match agents with the Configuring mandatory skills identified for an incident.

- **Assigned Incidents**: The number of incidents already assigned to this agent. The more incidents assigned, the lower the contribution to the agent's overall rank.
- **Last Assigned**: For the sake of balancing assigned work, prioritized the agent based on the last assigned work.

To create matching criteria, select the type and use the fields related to that type to build the query. After creating matching criteria, you can create a configuration for the assignment workbench by creating a matching rule of the type **Selection criteria** and selecting the desired matching criteria.

As part of selecting the matching criteria for the workbench configuration, you can specify the following settings for each individual criterion:

- ranking and display usage
- ranking method
- ranking weight
- threshold
- active/inactive

Ranking and display usage

In the **Use for** field, specify how you want that matching criterion to be used:

- Ranking and display: uses the criterion to determine agent ranking and displays it in a column on the workbench.
- Display only: displays the criterion in a column on the workbench but does not use it to determine agent ranking.
- Ranking only: uses the criterion to determine agent ranking but does not display it on the workbench.

Ranking method

There are two ranking methods:

- More is better: for example, more availability is better when determining the agent ranking.
- Less is better: for example, fewer assigned incidents are better when determining agent ranking.

Weight

Each matching criterion has an assigned weight. By default, the matching criteria has an assigned weight of 10. You can assign a higher weight to the criteria that's more important.

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Threshold

A threshold sets a minimum requirement for a criterion. For example, set the threshold of the Matching Skills criterion to 3 if you want to see only those agents who have at least three of the required skills for a task. For availability, set the threshold to the desired number of hours to display only those agents who have that minimum number of work hours available. You can set the threshold in the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Threshold** column.

Active/Inactive

There can be several matching criteria associated with the matching rule that determines the assignment workbench configuration. Each individual criterion can be set to active or inactive. Changing this setting has an immediate impact on the agent ranking. You can make this change in the **Select Criteria** related list on the Matching Rule form. If necessary, personalize the list and add the **Active** column.

Calculating the agent ranking

The assignment workbench adds the values of the matching criteria and their respective weights and uses these values to determine the overall agent ranking.

1. Calculate a number for each criterion.
2. Multiply that number by the criterion weight.
3. Divide the result by the total of all criterion.
4. Repeat for each criterion and add the results.

The following example shows how the ranking is determined for an agent with these matching criteria values:

- Matching Skills with Mandatory Skills Support: 5/6
- Availability Today: 7 hours
- Assigned Incidents: 2

Calculations:

- **Matching Skills**: `2 / 3 = 0.666` (with 3 being the maximum number of skills)
- **Availability Today**: `7 / 8 = 0.875` (with 8 being the maximum number of hours)
- **Assigned Incidents**: `2 / 26 = 0.0769` (with 26 being the total number of tasks in the table)
- **Weight**: each matching criteria has an equal weight of 10

```
((0.666 x 10) / Total of criterion weight (10+10+10)) + ((0.875
 x 10) / Total of criterion weight (10+10+10)) + ((0.0769 x
 10) / Total of criterion weight (10+10+10))
```

```
(6.66 / 30) + (8.75 / 30) + (0.769 / 30)
```

```
0.222 + 0.291 + 0.0256 = 0.53
```

This calculation is performed for each agent in the assignment group. Agents are ranked based on the value of this calculation, with the highest number earning the highest ranking.

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Scheduling in Workforce Optimization for Customer Service

By using Scheduling, you can manage your workforce resources efficiently by planning and managing schedules, staffing, and shifts across your teams all from one location. You can also integrate with on-call scheduling and create shifts and schedule for on-call rotations.

With Scheduling, you can do the following:

- Add meetings, training, time-off requests, or ad hoc work shifts by using the team calendar.
- Filter agents in the team calendar based on their location, region, assignment groups, or any field in the agent's record.
- Create shift and schedule plans for agents.
- Approve or reject agents' time-off and shift-swap requests.
- Track and manage the team's schedule on the team calendar by viewing the planned shifts versus the actual clock-in and clock-out times for the selected day, week or month.
- Analyze whether your team members are following the schedules. If you see a potential issue, you can easily alert your team so that they can take immediate action.
- Use historical adherence reports to analyze and recommend coaching opportunities for your agents.

To delve into more information behind your key performance indicators, filters and sidebars, see Exploring indicators with KPI Details

Create a shift plan

Schedule shifts for your team so that you can make sure that you are covering all work assignments and breaks. You can also specify the days of the week that you might need to override scheduled shifts.

Before you begin

Role required: sn_shift_planning.admin

About this task

In the **Shifts** tab, the shifts are grouped by active and inactive shifts. The contextual side panel displays the active and then the inactive shifts in the order it is displayed in the **Shifts** tab.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click the **Shifts** tab.
4. Click the plus (+) icon.
5. Create a shift.

To	Do this
Create a work shift	**a.** Create a work shift. **i.** Click **Work shift**. **ii.** In the **Name** field, enter a name for the shift. **iii.** Select the time window for the shift.

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To	Do this
	1. In the **Time Zone** field, select the time zone of the users that you want to allocate to the shift. **Note:** To add a shift for agents working in their local time zones, select the **Use agent time zone** option. The system uses the time zone that is specified in the agent's user record. 2. In the **Start Time** field, enter the time of day when you want to start the shift. 3. In the **End Time** field, enter the time of day when you want to end the shift. **iv.** Select the days of the week for which you want to add this shift. **v.** Click **Save**. **b.** Add schedule breaks to the shift. **i.** Select the shift that you created. **ii.** Click **Add break**. **iii.** In the **Name** field, enter a name for the break. **iv.** Set a duration for the break. 1. In the **Duration** field, enter the length of time for the break. 2. In the **Earliest Start Time** field, enter the earliest time to start the break. 3. In the **Latest End Time** field, enter the latest time to end the break. For example, you can set the earliest start time as 11:00, the latest end time as 15:00, and the duration of the break as one hour. If you add four agents to that work shift, the Scheduling application automatically staggers the break duration for each agent. Stagger breaks to ensure that your four agents can cover the entire shift span. 4. Click **Save**. You can view the number of agents for each hour or day on the shift span window.
Create an on-call shift	**a.** Create an on-call shift. **i.** Click **On-call shift**. **ii.** In the **Name** field, enter a name for the shift. **iii.** From the **Group** field, select a group that you want to assign for the shift. **iv.** Select the time window for the shift.

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To	Do this
	1. In the **Start Time** field, enter the time of day when you want to start the shift. 2. In the **End Time** field, enter the time of day when you want to end the shift. 3. From the **Time Zone** menu, select the time zone of the users that you want to allocate to the shift. **v.** Select the days of the week for which you want to apply the shift. **vi.** In the **Rotation start date** field, click the calendar icon, se lect the on-call rotation start date for the shift and click **OK**. **vii.** Click **Save**. **b.** Create the on-call rotation. **i.** Select the shift that you created. **ii.** Click **Create Rotation**. **iii.** From the **Agents** field, select the names of the agents you would like to be part of the shift. When you click the field, the name of all agents that belong to the group that the on-call shift is being created for is displayed. **iv.** From the **Rotate interval** field, select if you want the rotation to be daily or weekly. **v.** Click **Save**. **Note:** The **Escalation Type** field is auto-populated with **Rotate through rosters** field value if multiple rosters have been created for the rotation. If not, it is populated with **Rotate through members** field value. **c.** Click **Publish** to make the shift active and publish it on the schedule. **Note:** ○ You can select an active on-call shift and click **Unpublish** to make the shift inactive and remove it from the sched ule. ○ You can view all on-call shifts that have been published on the schedule in the agent and team calendar. When you add new agents to the on-call rotation, it might take some time to refresh the data on the team calendar. ○ You can click on an on-call shift in the team calendar to see more details. You can view the name of the primary agent for each on-call shift on the shift calendar.

6. Click **Submit**.

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Create a schedule plan

Manage your team's schedule by creating a schedule plan that covers a span of time and includes your team's work shifts. You can also assign agents to shifts based on their skills and availability. This way, you can make sure that you are using your resources in the best way possible for your organization.

Before you begin

Role required: sn_shift_planning.admin

About this task

You can set the number of days to cache agent schedules using the *sn_shift_planning.number_of_days_to_cache* system property. The **Total coverage/demand** row displays the number of agents covering each shift in a day. The day view displays the demand for the number of agents forecast for every hour in a day. For example, 4/5 shows that you have four agents scheduled for an hourly time slot, 11 AM to 12 PM and the agent demand forecast for that hour is 5.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Create a schedule plan.
   a. Click the **Team Calendar** tab.

      Note: You can analyze the staff alignment for a day, week, or month.

   b. In the contextual side panel, click the show schedules icon to display the schedules.
   c. In the Schedules panel, click + icon.
   d. In the **Name** field, enter a name for the schedule plan.
   e. From the **Start Date** field, select a date to start the schedule plan and click **OK**.
   f. From the **End Date** field, select a date to end the schedule plan and click **OK**.
   g. Click **Save schedule**.
   You can view the schedule of all agents in the assignment group that you directly or additionally manage.
4. Add a work shift to the schedule plan.

   Note: To add more shifts to an existing schedule plan, select the schedule plan and then add the work shift.

   a. In the contextual side panel, click **Add Shift**.
   b. In the **Shift** field, select the work shift that you want to add to the schedule plan.
   c. In the **Event type** field, select the work event that categorizes the work shift.
5. Add agents to the work shift.
   a. In the **Agents** field, search for agents and add one or more agents to add to the shift.
   b. Click **Save**.

   Note: It may take a few minutes for the screen to refresh.

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Result
The schedule plan is created in Draft state.

What to do next
Publish a schedule plan for visibility into team coverage.

Publish a schedule plan for visibility into team coverage

Generate a preview of your schedule plan and publish it so that your agents can see their shifts and schedules ahead of time. You can unpublish a schedule to make changes and then publish it again.

Before you begin
Role required: sn_shift_planning.admin

About this task
You can make a copy of a schedule and update it to create a new schedule. Updates could include modifying the schedule start and end dates as well as adding or removing shifts or agents.
When you make a copy of the schedule, the following updates are automatically made to the schedule copy:

- The start date is set to the current date and the end date to 30 days from the current date.
- The schedule state changes to **Draft**. You can make the necessary changes to the shift and select **Save**.
- The schedule only displays agents in the assignment group of the current logged in user.

You can also unpublish a schedule make updates, and then publish it again.

- If the start date is the either the current date or had occurred in the past, the schedule state remains as **Published** and the end date changes to tomorrow.
- If the start date is in the future, the scheduler changes the schedule state and agent schedules to **Draft**.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Schedule icon ( ).
3. Generate a schedule preview.
   a. Select the **Team Calendar** tab.
   b. Select the Show Schedules ( ) icon to display in the contextual side panel.
   The team calendar refreshes and generates the preview when you save a work shift.
4. Publish a schedule.
   a. Select a schedule and edit the schedule if necessary.
   b. Edit the schedule if necessary and select **Save**.
   c. Select **Publish**.

   Note: You can select **Delete** in **Draft** state and delete the schedule if you no longer need it.

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Result

All the schedules that are in **Draft** state move to **Published** state. You can view the published schedule on the team calendar for the assigned agents. You can also analyze the scheduling gaps and staffing information by switch between the day, week, and month views in the drop-down. Agents can view their published schedules and approved leaves on MS Outlook after synchronizing their team calendars and events with Microsoft Outlook.

Track and manage your team schedule

Create, update, or monitor the schedule for your team from one location. You can approve or reject requests for swapping shifts or time off for agents within your assignment group.

Before you begin

Role required: sn_shift_planning.admin

About this task

Using the calendar, you can do the following:

- View all of your agents by assignment group.
- Get insights into team compliance with published schedules.
- View an agent's work schedule that is actual shift time vs clock-in and clock-out times.
- Filter the team calendar based on the **Assignment Group**, **Location**, **Skills**, **Shift Plan**, and **Events** for a customized view.
- View current day schedule from **Today's schedules**.
- Modify the agent's shift, clock-in, and clock-out timings, if necessary.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Schedule ( ) icon.
3. Modify an agent's shift.
   The schedule that includes this shift must be in **Preview** or **Published** state.
   a. In the Team Calendar tab, navigate and hover over the shift for the agent that you want to modify the schedule for, in Day, Week or Month view.
   b. In the shift pop-up window, select the **Edit** ( ) icon.
   c. Modify the agent's shift or the shift time.

      Note: If the existing shift has a break, you can add more breaks to the shift.

      - Select **Select shift times** and modify the **Start time** or **End time** fields to change the timing of the shift.
      - Select the **Select preset shift** option and from the Shift plan list, select an existing shift to assign another shift plan to the agent. For more info on creating a shift plan, see Create a shift plan.
   d. Select **Save**.
4. Approve or reject an agent's time off or shift-swap with another agent.

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Note: You must approve a request two days before the time-off or shift-swap start date. If not, the approval is auto-rejected. An administrator can change this default setting. For more information, see Setting the due date for time-off and shift-swap request approvals in Components installed with Workforce Optimization for Customer Service Overlapping time-off requests by an agent is rejected.

Tab	Description
Shift approvals	View all agent requests and the details for each request and approve or reject a single request.
Time off requests	Approve or reject multiple time off requests.
Shift swap requests	Approve or reject multiple shift swap re quests.

If you approve the request, the schedule gets updated in the team calendar based on the approvals.

Create recurring meetings

Set recurring meetings or training sessions for your team from the Schedule tab. You can create daily, weekly, monthly, or yearly meetings.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Select the Schedule ( ) icon.
3. Navigate to **+New** > **Meeting**.
4. Enter the title of the meeting in the **Title** field.
5. Enter the name of the participants in the **Attendees** field.
6. Enter the start and end dates of the meeting in the **Start date** and **End date** fields.
7. Enter the start and end time of the meeting in the **Start time** and **End time** fields.
8. Select the **All day** option if the meeting duration is for the entire day.
9. Select one of the following options from the Repeats list.

Option	Steps
Does not repeat	It is a one-time meeting only.
Daily	**a.** Select a value in **Repeat every** field. For example, if you select 2, the meeting re peats every two days. **b.** Select a date in **Repeat until** field to se lect the date when the meeting series will end.

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Option	Steps
Weekly	**a.** Select a value in **Repeat every** field. For example, if you select 2, the meeting re peats every two weeks. **b.** Select the days of the week when you want the meeting to occur. For exam ple, if you select Monday and Thursday, then the meeting occurs on Monday and Thursday every two weeks. **c.** Select a date in **Repeat until** field to se lect the date when the meeting series will end.
Monthly	**a.** Select a value in **Repeat every** field. For example, if you select 1, the meeting re peats every month. **b.** Select a day from the **Monthly type** list: ▪ **Day of the month**: The meeting occurs on the selected day of the month only. ▪ **Last day of the month**: The meeting occurs on the last day of the month. ▪ **Last week day of the month**: For exam ple, if you selected a Thursday in the Start day field, the meeting occurs on the last Thursday of every month. **c.** Select a date in **Repeat until** field to se lect the date when the meeting series will end.
Yearly	**a.** Select a value in **Repeat every** field. For example, if you select 2, the meeting re peats every two years on the day you se lected in Start date field. **b.** Select a date from **Repeat until** field to select the date when the meeting series will end.

10. Enter some details and agenda about the meeting in the **Description** field.
11. Select **Save**.
    The meeting invite is sent to the participants selected in the Attendees field.

What to do next

You can view the meeting series on your team calendar. You can select the meeting invite on the team calendar and edit the whole meeting series or a particular meeting in the whole series.

Monitor schedule adherence of your agents

Use schedule adherence to evaluate whether or not your agents are adhering to their assigned schedules. You can look for areas where low-value activity can be eliminated or reduced and further analyze staffing levels throughout the day.

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Before you begin

Role required: sn_shift_planning.admin

About this task

- Adherence is a metric to analyze how closely agents follow their schedule in completing the work assignments. Conformance measures the work completed, regardless of when it was completed.
- A high adherence rate indicates that agents are sticking to their schedules and offering customer service when expected. Low adherence suggests changing the processes or decisions to manage the team efficiently. The numbers are highlighted in red for non-adherent agents.
- Schedule adherence and conformance calculations are based on the formulas, agents' actual and planned work timings. The following are the default formulas that are used to calculate adherence and conformance for agents. However, your administrator can change the formulas, as required. The following components and formulas are used to calculate adherence and conformance:
  - The *shift_planning_clock-in* and *shift_planning_clock-out* scripts generate the agents' clock-in and clock-out events from the login and logout sessions. The business rule *Agent Time Work Event Trigger* generates clock-in and clock-out events whenever there is a change in agent's presence state.
  - **Schedule Adherence**= (Minutes worked in shift/Scheduled shift time in minutes + Overtime)
  - **Conformance**= (Minutes worked in shift + Overtime)/Scheduled shift time in minutes
- The ideal adherence percentage by default is above 70, and conformance is between 80 to 120. However, your administrator can change the threshold values. For more information, see Configure properties for schedule adherence and conformance. The agents who do not qualify to the defined threshold values are considered as non-adherent and are highlighted in red.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. Monitor the schedule adherence of your agents.

To	Do this
View schedule adherence at the organization or team level	**a.** Click the **Schedule Adherence** tab. The bar chart appears with the schedule adherence percentage and conformance percentage of your teams. **b.** View the graph and drill down further to view the analytics of your team members by clicking on the bar.
Analyze planned vs. actual scheduling for your team members	**a.** Click the **Team Calendar** tab. **b.** Select the date. **c.** View the **Time Worked** summary by clicking on the bar representing the agent's actual time worked.

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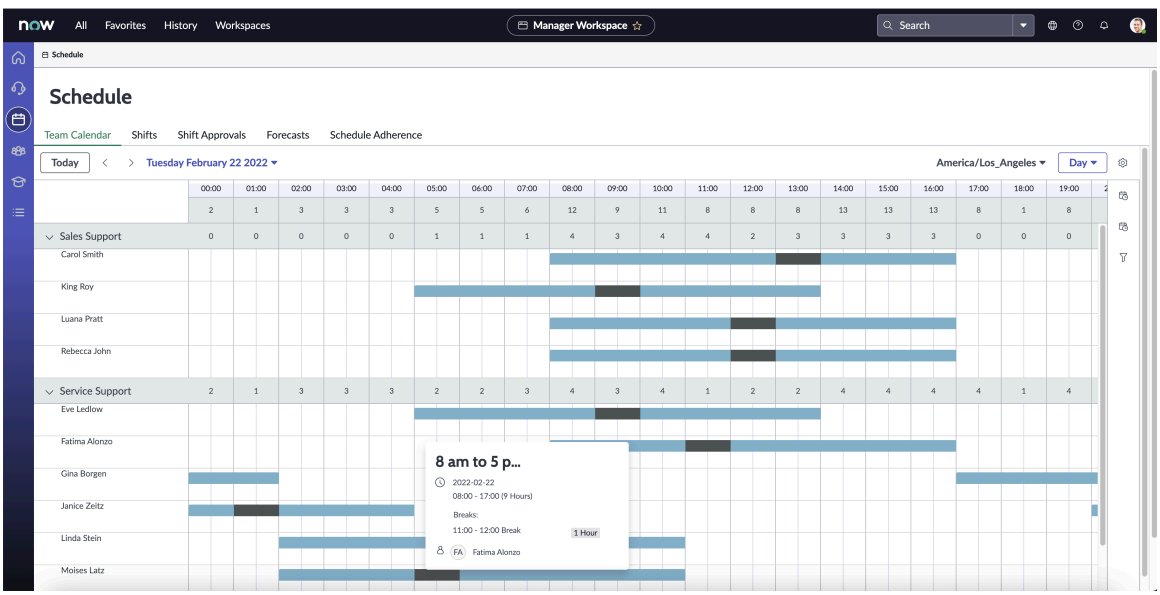
To	Do this
	Note: The clock-in and clock-out timings are the actual work timings of your agents. The events are generated based on the agent's login, logout actions, and presence state. If an agent forgets to clock out, the system automatically generates the clock-out event after 60 minutes by default. However, your administrator can change it using *`Default threshold time for clock-out event generation (in Minutes)`* system property. Example: A clock-in event gets generated when an agent logs in or changes the presence status to **Available**. Similarly, a clock-out event gets generated when an agent logs out of the system or changes the presence status to either Offline or Break. If an agent fails to clock-out past 60 minutes of the shift end time, the system automatically generates the clock-out event.

The following team calendar snapshot illustrates how to measure how well your team members are adhering to their work schedules. The blue bar indicates the planned work shift time and next to that is the actual worked time. The default representations are purple for clock-in time, green for agent's available duration, red for the clock-out time, and grey for agent's non-available time.



Analyze adherence and conformance from the time worked summary

View the time worked summary of your team members to determine if your teams are adhering to the planned schedules. You can also use historical adherence, which is a reporting view of real-time adherence, to see how well your agents have followed their schedules in the past.

Before you begin

Role required: sn_shift_planning.admin

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About this task

Adherence and conformance calculations are based on the defined configuration and your agents' actual and planned work schedules.

Note: Your administrator can disable schedule adherence or change the configuration for adherence and conformance. For more information, see Configure properties for schedule adherence and conformance.

For information about schedule adherence, see the "Schedule adherence" section of Scheduling in Workforce Optimization for Field Service.

Procedure

1. Navigate to **All** > **Workspaces** > **Manager Workspace**.
2. Drill down to view the time attendance and time worked summary of your agents.

To	Do this
Analyze time worked summary of your team	**a.** Click the Lists icon ( ). **b.** Under Schedule Adherence, click **Time Worked Summary**. **Note:** The **Available Non Planned** time captures the time the agent was available and clocked in outside of the agent's scheduled work events. For example, if an agent is scheduled to attend a training from 13:00 to 14:00 but forgets to clock out that attendance, that time is considered the clocked-in time. The training time from 13:00 to 14:00 is captured as the available non-planned time.
View your agents' time attendance	**a.** Click the Lists icon ( ). **b.** Under Schedule Adherence, click **Time Attendance**.

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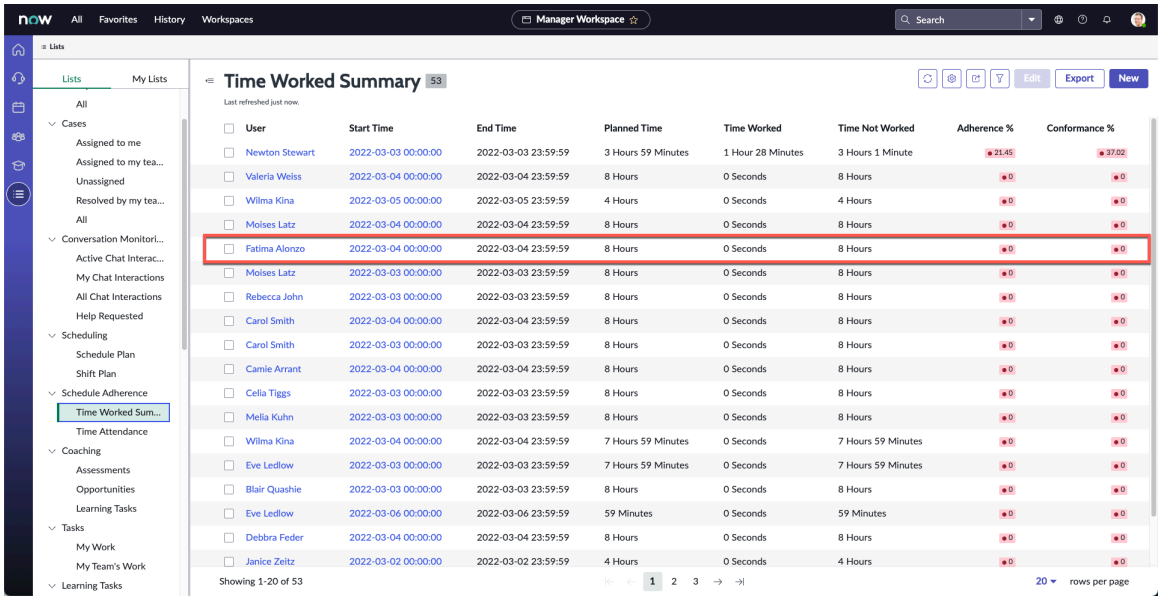
The following schedule adherence example shows how to measure how well your team is adhering and conforming with their work schedules.



Example:
To understand the computations of the fields in a time worked summary, consider Fatima Alonzo's work day:

- Shift time begins at 8 a.m. and goes to 4 p.m. = 8 hours
- Planned time = 8 hours = 480 minutes
- Clocks in 8 a.m. and clocks out at 12 p.m. for a break. Back from the break, clocks in at 12:30 p.m. and clocks out at 4 p.m.
- Minutes worked in shift = 480 - 30 = 450 minutes
- Schedule adherence= (minutes worked in shift/scheduled shift time in minutes + overtime) = 450/(480+65) = 82.57%
- Conformance= (minutes worked in shift + overtime)/scheduled shift time in minutes = (450 + 65) / 480 = 107.29 percent.

Note: Fatima Alonzo is adherent because the schedule adherence and conformance are within the threshold. To see which agents are non-adherent, look for the numbers highlighted in red.

Analyze staff alignment using Demand Forecast

Use Demand Forecast to plan the number of staff members that you require so that you have enough agents to do the job.

Before you begin
Role required: sn_agent_forecast.user

About this task
Using Demand Forecast, you can:

- Monitor agent or team shift coverage for any day, week, or month.
- Analyze if you are overstaffed, understaffed, perfectly staffed, or not aligned well with your staffing needs.

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- Adjust the staff alignment depending on the coverage you need and the schedule of your teams.
- Analyze staff alignment as you are creating a schedule.
- You can analyze the agent coverage you have and the actual demand for the number of agents based on assignment groups and work shifts in a day.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule ( ) icon.
3. Click the **Team Calendar** tab.
4. Analyze staff alignment for each shift.
   You can click the filter icon and select the assignment groups and shift plans for which you want to view the staff alignment.

To analyze staff alignment	Do the following
For each day	Select **Day** from the list. The **Total resources needed** row displays the demand for the number of agents for that day at the selected intervals of 15,30, and 60-minute. For example, at 15-minute intervals, a number 16 between 0700 and 0715 means that the agent demand forecast is 16. The time slots are color-coded as below to show the cover age of agents in a particular interval: **Highlight color for each day for a group** — **Description** Green — The number of agents you have scheduled for that interval and demand for that interval are an exact match—your staffing needs are perfectly aligned. Yellow — The number of agents you have scheduled are more than the demand you have for that interval. Red — The number of agents you have scheduled are less than the demand you have for that interval. Grey — The demand for the number of agents and the number of agents scheduled is zero for that interval.

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<table>
<tr><th>To analyze staff alignment</th><th>Do the following</th></tr>
<tr><td>For a given week</td><td>
a. Select Week from the list.

The Total coverage/demand row has indicators for the staff alignment.

<table>
<tr><th>If the row displays</th><th>Then</th></tr>
<tr><td>An arrow points downward</td><td>The predicted forecast is lower than the number of agents you need for that day</td></tr>
<tr><td>An arrow points upward</td><td>The predicated forecast is higher than the number of agents you need for that day</td></tr>
<tr><td>A checkmark</td><td>The perfect alignment of the predicted forecast and the required number of agents.</td></tr>
</table>

b. Click any of the indications displayed in the Total cover age/demand row to analyze further details on the fore cast.

You can also view the coverage and demand for every hour for each group.
</td></tr>
<tr><td>For a given month</td><td>
a. Select Month from the list.

The month view displays current week and the upcoming three weeks (28 days) on the calendar in a single view. The current day is highlighted in purple.

b. In the calendar drop-down, set a date.

Up to four weeks starting the week containing this date ap pear on the team calendar.

c. The Total coverage/demand row has indicators for the staff alignment.

<table>
<tr><th>If the row displays</th><th>Then</th></tr>
<tr><td>An arrow points downward</td><td>The predicted forecast is lower than the number of agents you need for that day</td></tr>
</table>
</td></tr>
</table>

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To analyze staff alignment	Do the following

If the row displays	Then
An arrow points upward	The predicated forecast is higher than the number of agents you need for that day
A checkmark	The perfect alignment of the predicted forecast and the required number of agents.

d. Click any of the indications displayed in the **Total coverage/demand** row to analyze further details on the forecast.

You can also view the full day's coverage and demand for 28 days in a single view.

The training, time-off, and meeting events that are less than four hours are hidden in the Month view.

Note: Your administrator can set:

- the *sn_shift_planning.enable_month_view_for_team_cal* system property to `false` to remove the **Month** option in the drop-down. This system property is set to true by default in the CSM. The month view is enabled by default for ZBoot customers.
- the value in the *sn_shift_planning.hide_events_by_duration_in_mon* system property to the maximum number of hours for which an event (training, time-off, and meeting) must be hidden on a calendar in the month view. By default, the value is set to `4`.

The following scheduling snapshots provide you an example to analyze staff alignment using Demand Forecast. The misaligned staffing indicator in the pop-up shows that the forecast

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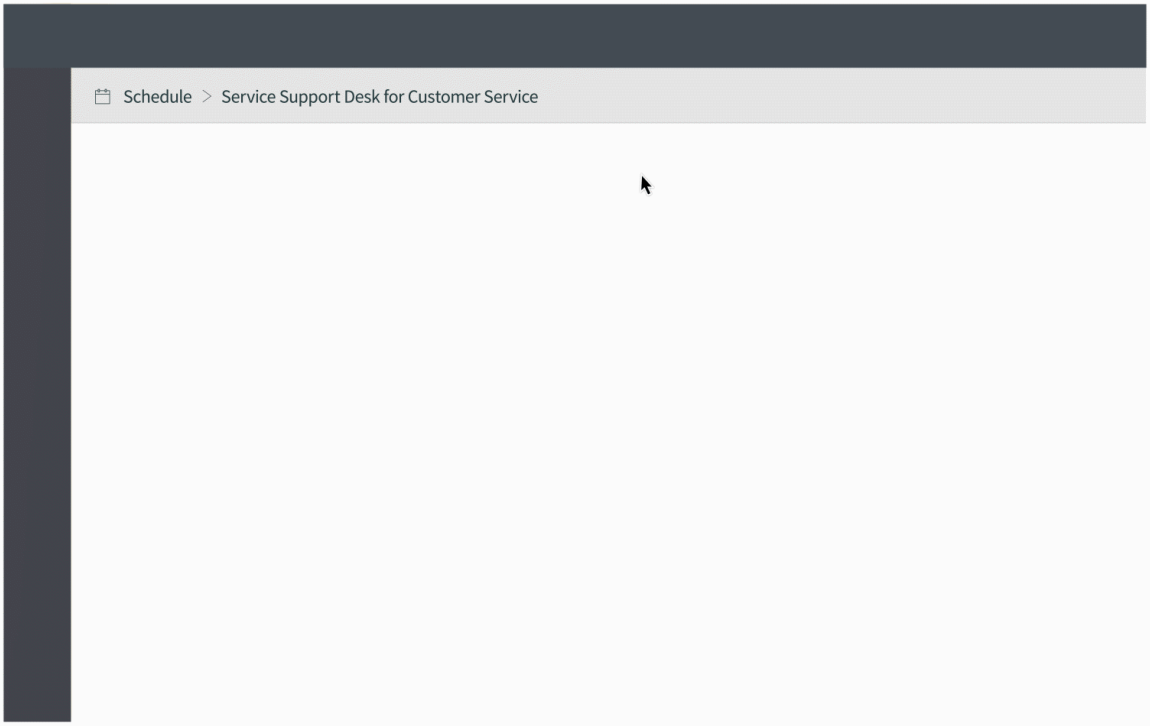
manager has scheduled certain number of agents for each shift but they need more agents to cover them.



Add events to the team calendar

Create a meeting, training, time-off request, or an ad hoc work event from the team calendar.

Before you begin

Role required: sn_shift_planning.admin

About this task

You can create custom event types and add or remove the desired fields. For more information, see Create event types to display them on the team calendar.

Procedure

1. Navigate to **All** > **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).
3. Click the **Team Calendar** tab.
4. Click **+New**.
5. Create an event.

To	Do this
Create a meeting, training, or time-off request.	**a.** Determine the type of event you are creating. ▪ To schedule a meeting, select **Meeting**. ▪ To create a training event, select **Training**. ▪ To create a time-off request, select **Time-off**. **b.** Fill in the event form.

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To	Do this
	i. In the **Title** field, enter a name for the meeting. **ii.** Add the required names for the event: ▪ For a meeting, in the **Attendees** field, enter the names of the meeting attendees. ▪ For training, enter the names of the agents to be trained in the **Trainees** field. ▪ For a time-off request, enter the names of the agents in the **Agents** field. In the **Attendees** field, start typing the name of each of the attendees for the meeting and se lect the name. **iii.** In the **Start date** field, click the calendar icon and select the date you want to start the meet ing and click **OK**. **iv.** In the **End date** field, click the calendar icon and select the date you want to end the meet ing and click **OK**. **v.** If the meeting spans for the whole day, click the **All Day** slider. **vi.** In the **Description** field, enter a description for the meeting.
Create a work shift	**a.** Click **Work**. **b.** In the **Agents** field, start typing the name of each agent to be assigned to the work shift and select the name. **c.** In the **Start date** field, click the calendar icon, se lect the date you want to start the work shift, and click **OK**. **d.** In the **End date** field, click the calendar icon, se lect the date you want to end the work shift, and click **OK**. **e.** Click the **Select Shift** field and select a shift.

6. Click **Save**.

Swap agent shifts in Workforce Optimization for Customer Service

Swap an agent's shift in an assignment group with another agent who can work on that shift and skip the approval process.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Schedule icon ( ).

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3. In the **Team Calendar** tab, navigate and point to the shift for the agent that you want to swap with another agent in day, week or month views.
4. In the shift pop-up window, click the Shift Swap icon (↑↓).
5. In the **Requested Shift** section, click the **Agent** field and select the agent who can work on that shift.
6. Click **Submit**.
   The team calendar displays the updated schedule.

Enable your teams to sign up for work shifts

Empower your teams to sign up for work shifts based on their availability and preference.

Before you begin

Role required: sn_shift_planning.admin

About this task

When a schedule plan is enabled for sign-up, you can receive notifications. You can also receive notifications when the schedule plan that's open for sign up is due on the current day or when it's due soon.

Important: Your administrator must set the value in the *glide.ui_notification.max_recipients* property to the maximum number of agents for which you want to send the notifications.

Procedure

1. Navigate to **All** > **Workforce Optimization for CSM** > **Manager Workspace**
2. Select the Schedule icon ( ).
3. Add a schedule plan.

   a. Select the **Team Calendar** tab.

   b. In the Contextual side panel, click the Show Schedules icon to display the schedules.

   Tip: Select the filter icon ( ) and then select the desired sign-up state and sign-up dates to narrow down the schedule plans enabled for sign-up.

In the filters, to add the desired	Do this
Sign-up state	i. Double-click one or more sign-up states in the **Available** column to move them to the **Applied** column. ii. Select **Apply**.
Sign-up dates	i. Select a predefined option such as **Last 7 days** or select the start and end date for which you want to see the schedule plans enabled for sign-up. ii. Select **Apply**

   c. In the Schedules panel, select the + icon.

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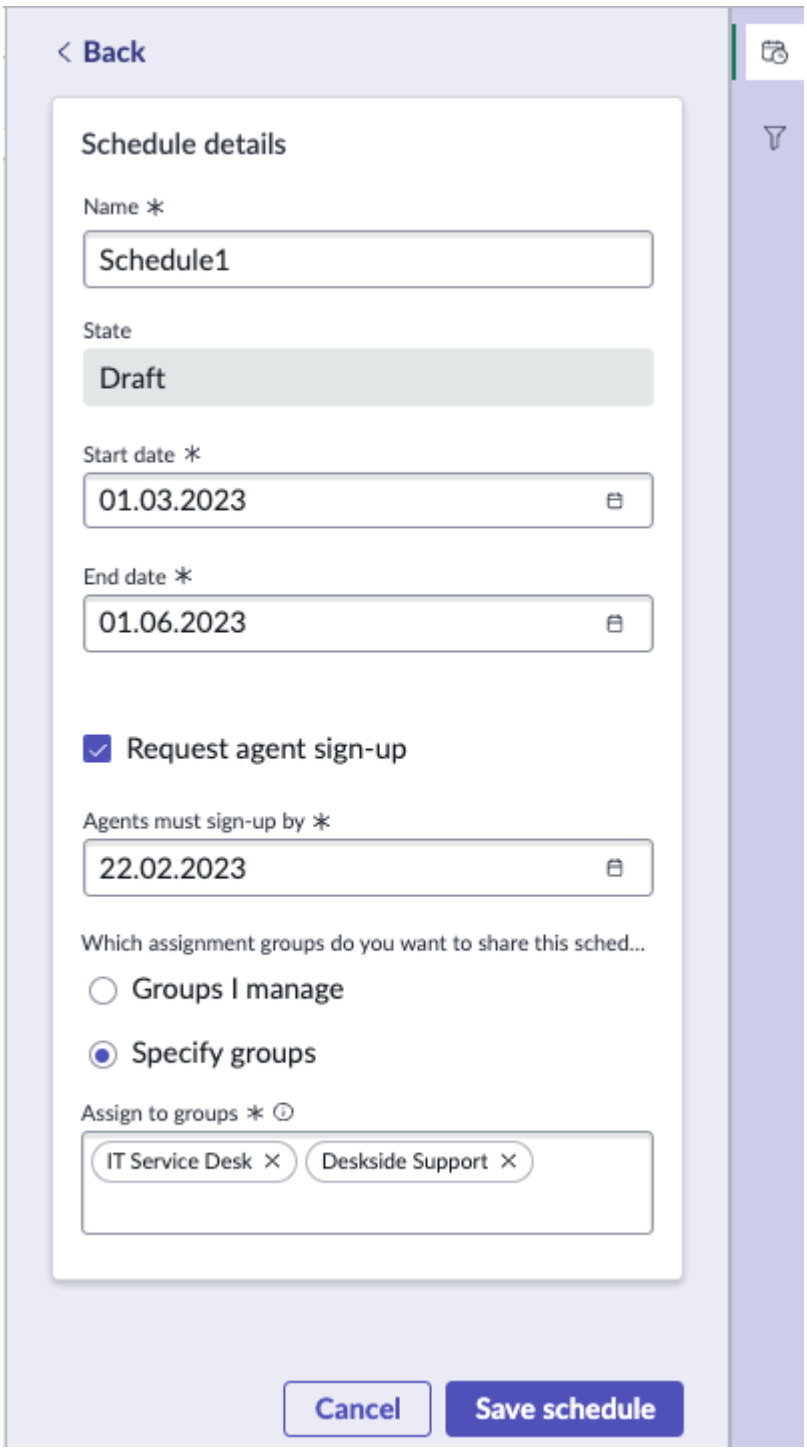
You can duplicate an existing schedule to create another one. After you duplicate a schedule that has the shift sign up enabled, you can update the start date, end date, and the date for which the agents must sign up for the schedule.

Note: If there are no agents associated with the schedule, then the shifts associated with the schedule aren't duplicated.

d. Fill in the required fields on the form.
The image below shows an example of a filled-in Schedule form.



e. To enable your agents to sign up for work shifts, do the following:

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i. Enable the **Request Agent Signup** check box.

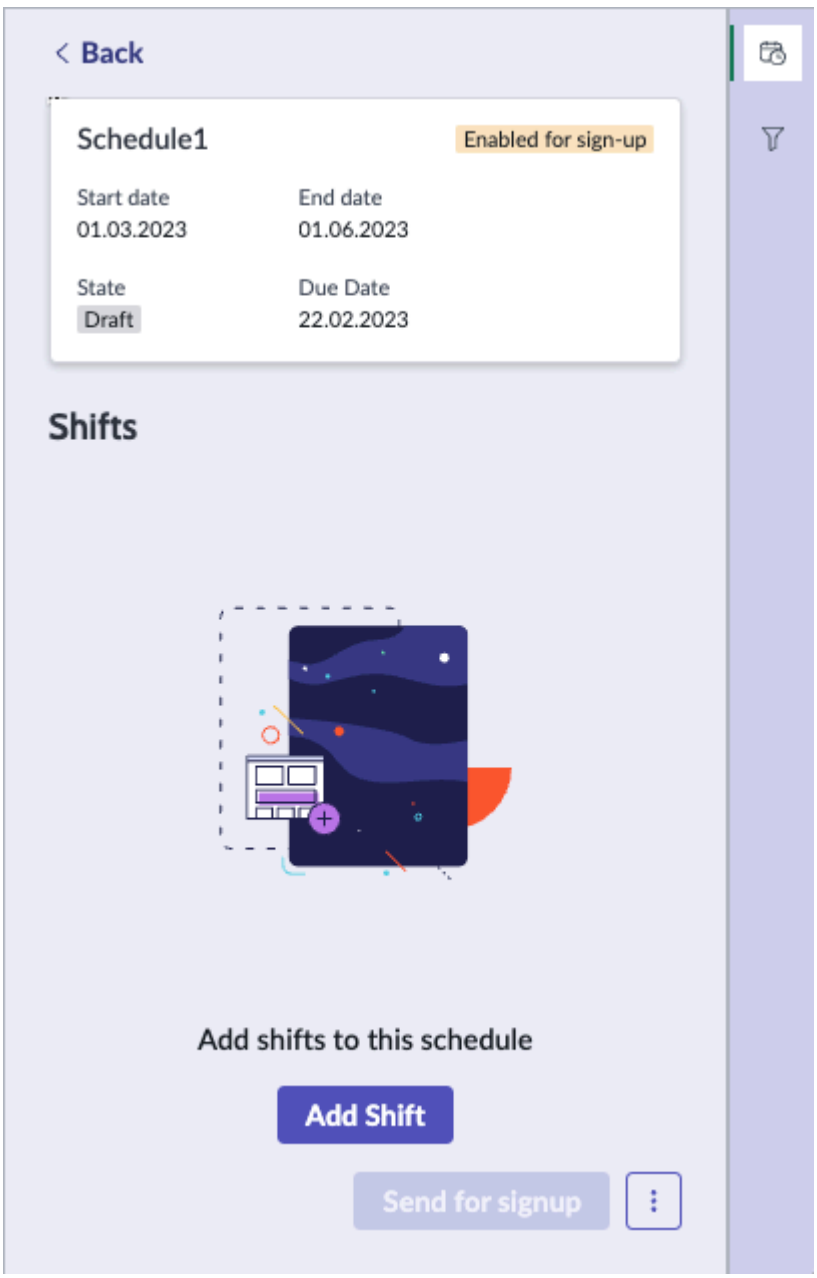
ii. In the **Agents must sign-up by** field, enter the date by which they must sign up for shifts within that schedule.

Tip: If your agents have signed up for their preferred shifts, the **Assigned To** field is auto-populated with those agents.

f. Select **Save schedule**.

4. Add a work shift to the schedule plan.

a. Select the schedule plan you've created.
The image below displays the schedule plan that was created.



b. Select **Add Shift**.
The image below provides an example of a form to enter the details for a shift.

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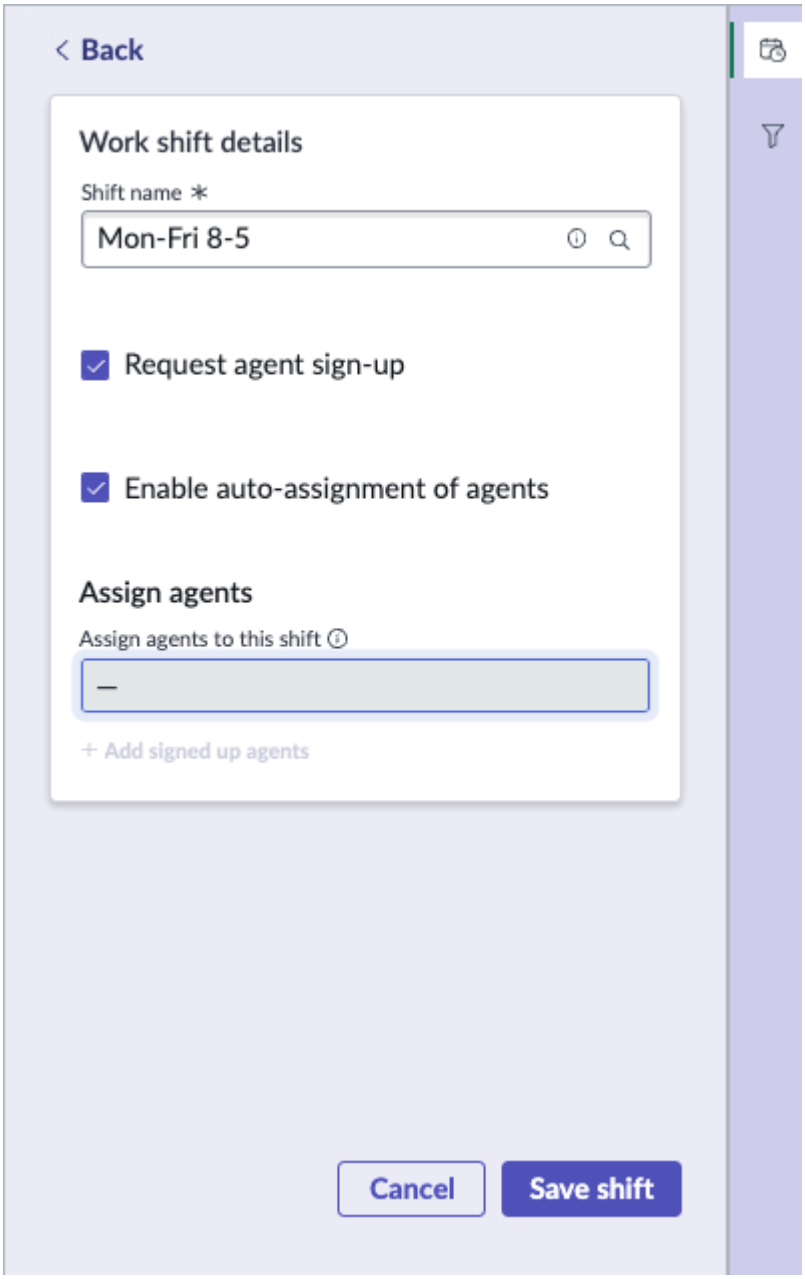

c. In the **Shift** field, select the work shift that you want to add to the schedule plan.

> **Note:** If the schedule plan has been enabled for agents to sign up for shifts, the following fields are automatically enabled:
>
> - **Request agent sign-up**
> - **Enable auto-assignment of agents**
>
> If you want to assign agents manually, you can disable these check boxes at any time.

d. If the shifts are enabled for sign-up, you can select **Send for signup**.
All shifts that have been enabled for sign-up are sent to the agents to sign up for their shifts. You can select **Close sign-up** to close agent sign-up for a shift before the sign-up due date and manually assign the agents.

- The **Enabled for sign-up** highlighted label changes to **Closed for sign-up**.
- The system will automatically close the sign ups after the sign-up due date.

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5. Add agents to the work shifts.

To	Do this
Auto-assign agents	Enable the **Enabled for auto-assignment for agents** check box. Your agents who have set the shift to be their top preference is auto-assigned. The number of shifts au to-assigned is based on the value set in the *sn_shift_planning.max_shifts_to_autoassign* system property.
Assign agents manually	**a.** In the **Assign agents** field, search for agents and add one or more agents to add to the shift. **b.** To add agents who had signed up for shifts, select **+Add signed up agents** You can view the agents who had signed up and their preferred ranking to work on that shift. If you don't want to display the agents who have already been assigned to a shift in that schedule plan, enable the **Hide agents already assigned to other shifts** toggle button. **Note:** This option is only available af ter you've closed agent sign-ups for the shift. **c.** Select **Save selection**.

6. Select **Save shift**.
   The state for the schedule plan changes to **Generating Preview**.

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7. To publish the schedule plan, select **Publish**.

Note: It may take a few minutes for the screen to refresh.

The table describes the different shift sign-up states in the schedule plan.

Schedule plan sign up state	Description
Sign-up not enabled	The schedule plan isn't enabled for sign-up.
Enabled for sign-up	○ Schedule plan is enabled for sign-up but isn't yet ready for agents to sign up for shifts. ○ Schedule plan can't be published when enabled for sign-up.
Open for sign-up	○ Schedule plan is enabled for sign-up and is ready for agents to sign up. ○ Schedule plan can't be published or deleted when it's open for sign-up. ○ When open for sign-up: ▪ The sign-up due date can't be changed. ▪ The work shift details can't be changed. ▪ New shifts can't be added. ▪ If enabled for auto-assign, the agent assignment in a shift can't be changed.
Closed for sign-up	Schedule plan is closed for agents to sign up.

Sign up for your preferred shifts

Specify one or more shifts in a schedule plan for which you would prefer to sign up.

Before you begin

Role required: sn_shift_planning.agent

About this task

You can receive notifications when your manager makes a schedule plan available for sign up. You can also receive notifications when the schedule plan that's open for sign up is due on the current day or when it's due soon.

Procedure

1. Navigate to **Workspaces** > **Service Operations Workspace**.
2. Select the Schedule icon ( ).
3. Select the **Sign up shifts** tab.

   You can use keywords to search the schedule plans, and view all schedules with active shifts for your assignment groups that you can sign up for. Use the pagination to scroll through all available schedule plans.

   The current state of each schedule plan displays as a highlight in each card. The table below describes the highlighted value.

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Highlighted value	Description
Available	Shifts for the schedule plan are available for sign up.
Draft	Shifts you've considered for sign-up but have not completed the sign-up process.
Completed	Submitted one or more preferred shifts within the schedule plan.
Closed Incomplete	The schedule plan currently does not have shifts for which you could sign up.
Closed Complete	The schedule plan has at least one preferred shift for which you've signed up.

4. Select the Overlapping time off icon ( ) to analyze if the time off you have requested or the ones that have been approved overlap with the schedule plan available to you for sign up.
5. To sign up for your preferred shifts, select **Add shifts**.
   You can only sign up for shifts in the schedule plan that have not been published yet.
   The Add shifts pop-up appears. You can search for shift using the search bar and select shifts to save as draft.

   You can sign up for a maximum number of shifts that your administrator has set up in the *sn_shift_planning.max_shifts_allowed_for_signup* system property.
6. To save the selected shifts for sign-up, select **Save Shifts** and then select **Save as draft**.
7. Select the plus (+) sign and sign up for additional shifts.
   When you have more than one shift, you can reorder them by using the up or down arrows in card for each shift.
8. Select **Submit**.
   All shifts you have added for sign up will be submitted.

Managing user criteria for event types in Workforce Optimization for Customer Service

Manage user access for any event type such as meeting, training, and time-off requests in the team calendar.

You can include or exclude Create, Read, Write or Update, and Delete (CRUD) rights for event types using the inclusion and exclusion user criteria access. You can perform the CRUD operations for users, groups, or roles.

Note: By default, team members don't have read-access to events of type **Actual work**.

For additional flexibility around managing the CRUD access, you can set the user criteria for each event type. For example, if team members don't have access to edit their work shifts using their role-based access, you can set that access using user criteria. You can set this access for specific team members or for the whole group.

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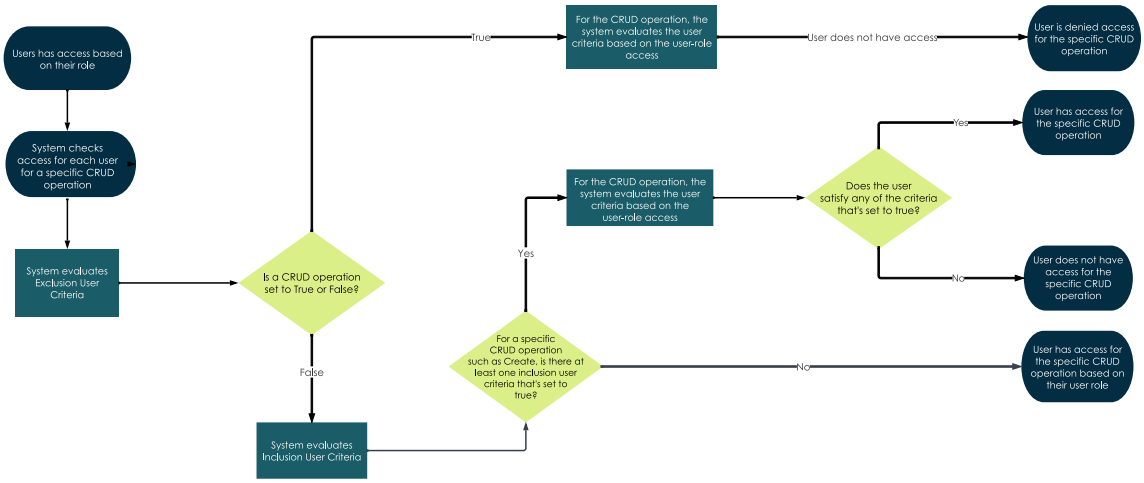
Inclusion and exclusion logic for event types



How inclusion and exclusion user criteria access works

When the user criteria rules get evaluated, it's done in the following order:

1. The system first evaluates the exclusion access for each criteria.
   - If the exclusion access for a CRUD operation is set to **true**, then the system evaluates the user criteria.
     a. If the user doesn't have access based on their role, then the user is denied access for the specific CRUD operation.
     b. If the user isn't denied access, then the system evaluates the inclusion criteria.
   - If the exclusion access for a CRUD operation is set to **false**, then the system evaluates the inclusion criteria.
2. For the inclusion access, for a specific CRUD operation such as Create, the system checks if at least one of the inclusion user criteria is set to **true**. If yes, then the system evaluates the user criteria based on the user's role access.
   - If the user:
     - Has access for the CRUD operation based on their user role, then the user can perform that action. For example, if the event type is training and the CRUD operation is **Create** then the user can create the training event types.
     - Doesn't have access for the CRUD operation based on their user role, then the user can't perform that action.
   - If at least one of the inclusion criteria isn't set to **true**, the user doesn't have access to the specific CRUD operation. In this example, the user can't create the training event types.

Note: The exclusion access always takes precedence over the inclusion access. If no inclusion or exclusion access is set, then the role-based access is used for managing event types.

Create user criteria for event types in Workforce Optimization for Customer Service

Add a user criteria record to specify which users, roles, and groups can access event types in Workforce Optimization for Customer Service.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **User Criteria**.
2. Select **New**.
3. On the form, fill in the fields.

User criteria form field

Field	Description
Name	Unique name for the user criteria
Users	Users who can access event types.
Groups	Groups who can access event types.
Roles	Roles who can access event types when you apply the user criteria.
Advanced	Option to create a script for the user criteria.
Active	Enabling the check box makes the user criteria available.
Companies	Companies who can access event types.
Location	Locations that can access event types.
Departments	Departments that can access event types.
Match All	Option to make every condition that is set required when the user criteria are applied.

4. Select **Submit**.

Include or exclude user access for event types

Add or remove access to users for any event type so that they can view event types that are relevant only to them.

Before you begin

Role required: sn_shift_planning.admin

Procedure

1. Navigate to **All** > **Workforce Optimization for CSM** > **Scheduling** > **Event Configuration**.
2. Select an event.
3. Exclude or Include specific CRUD access for users to events.

To	Do this
Exclude users for which you do not want to enable specific access to event types. **Important:** For exclusion, a Create access will deny the user from creating events because it excludes that access for the user. The same principle applies to any of the CRUD operations.	**a.** Select the **Evaluate access for exclusion** tab. **Note:** You can set the CRUD access for each user criteria where you would exclude the user from specific CRUD operations.

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To	Do this
	b. To create a new **Event Exclusion User Criteria**, select **New**. **c.** In the **Name** field, enter a name, which is an entity of users that is evaluated for the exclusion user criteria for the selected event type. This entity identifies and associates the user criteria to the event type.. **d.** In the **User criteria** field, select the user criteria record for which you want to set exclusion CRUD operations. **e.** Select the CRUD operations for which you do not want to give access. **f.** Select **Submit**.
Include users for which you want to enable specific access to event types. **Important:** **For inclusion, for specific CRUD operation such as Create, the system evaluates if at least one of the inclusion user criteria is set to true:** ○ **If any of the criteria is set to true, then the system checks if the user satisfies the criteria.** ▪ **If the user satisfies the criteria, then they have access for the specific CRUD operation.** ▪ **If the user does not satisfy the criteria, then they don't have access to the CRUD operation.** ○ **If none of the criteria is set to true, the user has access to the specific CRUD operation. This is based on the default behavior where all users have access based on their roles before they're added to the user criteria.**	**a.** Select the **Evaluate access for inclusion** tab. **b.** To create a new **Event Inclusion User Criteria**, select **New**. **c.** In the **Name** field, enter a name for the event inclusion user criteria. **d.** In the **User criteria** field, select the user criteria record for which you want to set inclusion user criteria access. **e.** Select the CRUD operations for which you want to give access. **f.** Select **Submit**.

4. Click **Update**.

Verify access criteria for a group or a team member in Workforce Optimization for Customer Service

Check what create, read, update, and delete rights your groups or your team members have for events to make sure that they have the correct permissions that they need.

Before you begin

Role required: sn_shift_planning.admin

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. In the lists module, go to **Scheduling** > **Event type**.
3. Select an event for which you want to verify user access.
4. Select the **User access** tab.
5. Do any of the following.

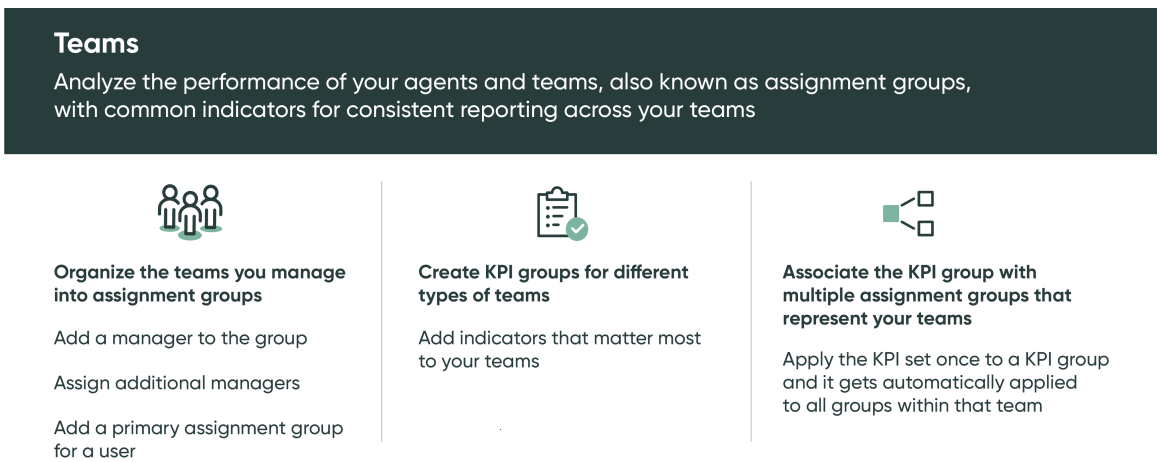
To	Do this
Verify user access for all your groups	Select **All my groups**.
Specific groups and team members	**a.** Select **Specific groups and team members**. **b.** In the **Specific groups** field, enter the groups for which you want to verify user ac cess. **c.** In the **Team members** field, select the mem bers of your team for which you want to veri fy the access. **d.** Select **Check user access**.

The screen displays the create, read, write, and delete columns as **true** for each team member that has access to the specific type of access to the selected event.

Teams in Workforce Optimization for Customer Service

Teams lets you organize each of your teams into assignment groups, define a set of key performance indicators (KPIs) to analyze the performance of all groups within a team, drill into the metrics for a group, an agent, or an incident from a central location, and manage your teams effectively from a single location.

This video gives you an overview of how you set up your teams into assignment groups and add KPIs to measure performance.



Drill down into your reports.

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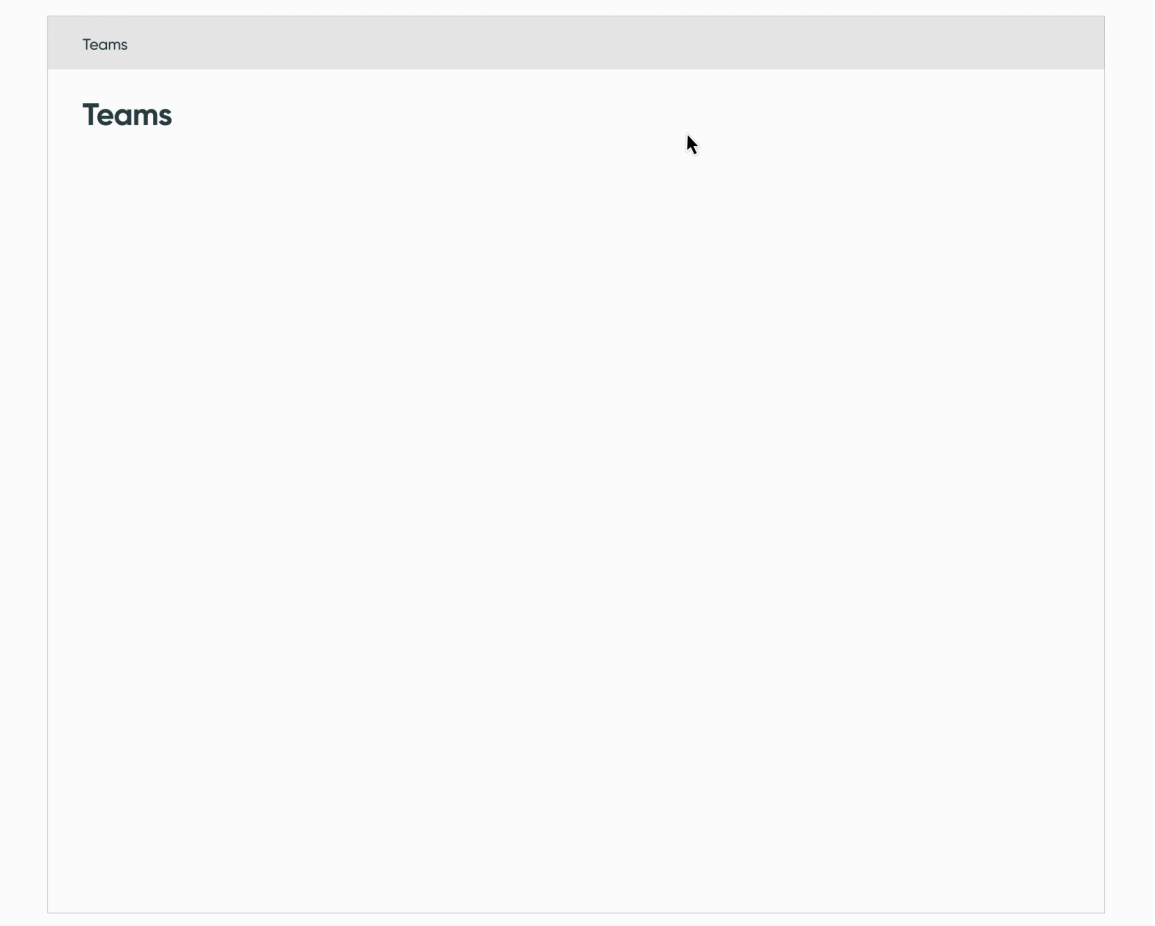

As an administrator for **Teams**, you can:

- Create a KPI group for a common set of indicators (KPIs) you use to measure your teams' performance.

  Note: Your teams are defined as **assignment groups** within the **Teams** application.

- Add the KPIs to the KPI group.
- Add assignment groups to the KPI group.

  Note: Ensure that you have a manager added to each assignment group. The manager is the one that either directly manages the assignment group or one that needs visibility into the assignment group.

As a manager, you can:

- Analyze the performance trends for your teams.
- Drill down into the performance of teams, agents, or cases.

Example

Our example employee is the manager of Customer Service Desk and manages 15 teams. The manager is also an additional manager of most teams and has visibility into the operations, although the agents don't directly report to them.

To effectively analyze the performance of each team from one location, the manager sets up the **Teams** as follows:

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1. Organizes the teams into groups called assignment groups. The teams either directly report to the manager or the manager may have visibility into their performance.
2. Creates a KPI group with a set of indicators that matter most to measure the performance of the assignment groups.
3. Adds all assignment groups that use the set of KPIs to the KPI group.

With this set up, the manager can effectively analyze the performance of their teams grouped by KPI groups.

Managers can set up and use Teams by performing the following steps:

1. Create a KPI group
2. Add KPIs to that group
3. Add managers to assignment groups
4. Add assignment groups to the KPI group
5. Drill down into a KPI, agent, or an incident to analyze performance

For detailed information on how to setup and use Teams, see teams.

Related topics

Setting up Teams Workforce Optimization for Customer Service

Using Teams in Workforce Optimization for Customer Service

Using Teams in Workforce Optimization for Customer Service

Use Teams to track and analyze performance trends for your teams from a single location. You can monitor the trends for each agent within your team and compare your agents or team members with one another.

With Teams, you can do the following:

- Identify skill gaps so that you can recommend which skills are needed to coach your agents.
- Organize your teams into assignment groups. You can add a set of key performance indicators (KPIs) to help you measure team performance consistently across the groups. For example, the Customer Service Desk unit contains multiple teams, such as Hardware and Network Support. You can create a KPI group for the Customer Service Desk unit and then add Hardware and Network Support as assignment groups to this KPI group. Next, you add a set of KPIs to the KPI group. With this data, you can measure the performance trends across the Hardware and Network Support teams.
- Compare KPIs between multiple teams belonging to the same KPI group.
- View the KPIs between the selected date range.
- Drill down into a Team level KPI to view the split of KPIs across all individual team members.
- View the KPI trend to analyze the future forecasts for each of the KPIs, if the date range has the latest values.
- Targets can be set on the KPIs through the team performance page at the global or individual level. When such targets are set, the trendline reflects the targets.
- Drill down to the individual agent level to view a 360 degree view of the current work, historical KPIs, presence history, channel capacity utilization, skills, and upcoming time-offs.

Analyze the performance trends for your teams

Analyze trends to monitor your team's performance and adherence within a KPI group.

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Before you begin
Role required: sn_csm_wfo_workspa.manager

About this task
Analyze the data by drilling down into the data for a team, a specific team member, an indicator, or a case.

Procedure
1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon.
3. Select a date range to view your teams' performance for that time period.
   You can set the default date range using the *sn_team_perf.default_date_range* system property.
4. Analyze team performance.
   a. Select a team.
   b. In the **Performance** tab, track and analyze the overall indicator performance for all members in the team.
   c. Drill down into the data for this team:

Performance indicators

To	Do this
Analyze indicator performance	▪ To analyze the indicator performance for the team, click an indicator value for the team in the header row. ▪ To analyze indicator performance for a team member, click an indicator value for the team member.
Track cases	Click the **Tasks** tab and analyze all cases related to the team. ▪ To view the cases details, select a case. ▪ To view the a team member's details, select a team member.

You can also review cases, details of assignment groups, additional managers, and information relevant to the team.

Related topics
Setting up Teams Workforce Optimization for Customer Service

Coaching in Workforce Optimization for Customer Service
Coaching lets you review and assess the quality of completed interactions and tasks, enhance your teams' skill set by assigning training based on the assessments, add skills to their profile when they get trained, and identify skill gaps to train your agents effectively.

Here's an example of how Workforce Optimization for Customer Service uses Predictive Intelligence to recommend skills for agents:

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Scenario for recommending skills using predictive intelligence

Step	Description	Example
1.	Predictive Intelligence associates the cases that were closed using similar skills and then groups the tasks by the agents who resolved them.	Predictive Intelligence looks at the similarity between the tasks that were resolved using the skill Firewall.
2.	When agents resolve cases, the Skill Recommendation application stores the skill and agent associations.	Agent A completes a task that requires the skill Firewall, but that skill is not in the agent's user profile yet.
3.	System administrators set the threshold for the skill and agent associations. When the threshold is reached, the Skill Recommendation application recommends to the agent's manager that the skill be added to an agent's profile.	The system administrator sets the threshold at 10. That means the agents have to complete at least 10 tasks that require a specific skill, before the predictive intelligence engine can recommend that specific skill for the agents. Agent A completes 10 tasks that required the skill Firewall, and currently Agent A is not assigned skill Firewall. The Skill Recommendation application recommends the skill Firewall for Agent A to the agent's manager.
4.	The manager approves and adds the skill to the agent's profile.	Agent A's manager approves the skill Firewall and adds that skill to Agent A's profile.
5.	Advanced work assignment (AWA) uses the new skills that were added to the agent's profile, looks up tasks that require those skills, and assigns the agents to complete those tasks.	When a task requires the skill Firewall, Agent A is automatically considered for that task assignment.
6.	Over time, the Predictive Intelligence machine learning algorithms learn which skills were assigned to the agents to resolve the cases.	

As a coach, you can:

- Use surveys to evaluate your team's performance.
- Recognize improvement opportunities and assign training tasks.
- Assess a trainee's ability to resolve cases.
- Assign training that is based on the assessments.
- Add skills to a trainee's profile that is based on a recommendation from Predictive Intelligence.

As a trainee, you can get trained to address your skill gaps.

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Example

For example, Amy Jones manages Customer Service operations for a large organization and has 12 teams reporting to them. Each team has anywhere from 8 through 15 agents. She is also added as a manager to other teams to increase visibility.

Amy Jones wants a single location to:

- Monitor the skills each team uses to solve issues
- Analyze metrics and monitor pending coaching assessments and training for the teams
- Add skills used for resolving issues or when Predictive Intelligence Workbench recommends them.

Amy Jones can manage all of these actions by doing the following:

1. Set conditions that trigger coaching opportunities.
2. Assess agents' skills and assign training.
3. Add skills to agent profile when they complete training or using recommendations from Predictive Intelligence.

For detailed instructions to use Coaching in Workforce Optimization for Customer Service, see Coaching.

Related topics

Setting up skill prediction in Workforce Optimization for Customer Service

Using Coaching in Workforce Optimization for Customer Service

Using Coaching in Workforce Optimization for Customer Service

By using Coaching in Workforce Optimization for Customer Service, you can assess your team's abilities to efficiently resolve cases by reviewing their work at critical moments of customer service.

With Coaching, you can do the following:

- Recommend training for your agents to address skill gaps.
- Use the coaching opportunities that are available by default to coach your agents. You can also create a coaching opportunity using the Coaching application specific to your agent needs.
- Use assessments and surveys to apply consistent, measurable scores across teams.
- Use Predictive Intelligence to recommend skills for your agents and provide training to address those skill gaps.

Skills Overview in Workforce Optimization for Customer Service

Use Skills Overview to analyze skill data such as how many skills are assigned to users and tasks. You can also see how many experts you have for a particular skill and the overall skill coverage by your teams.

Access Skills Overview from the Teams application:

1. Go to **Workspaces** > **Manager Workspace**.
2. Click the Teams icon .
3. Select a team.

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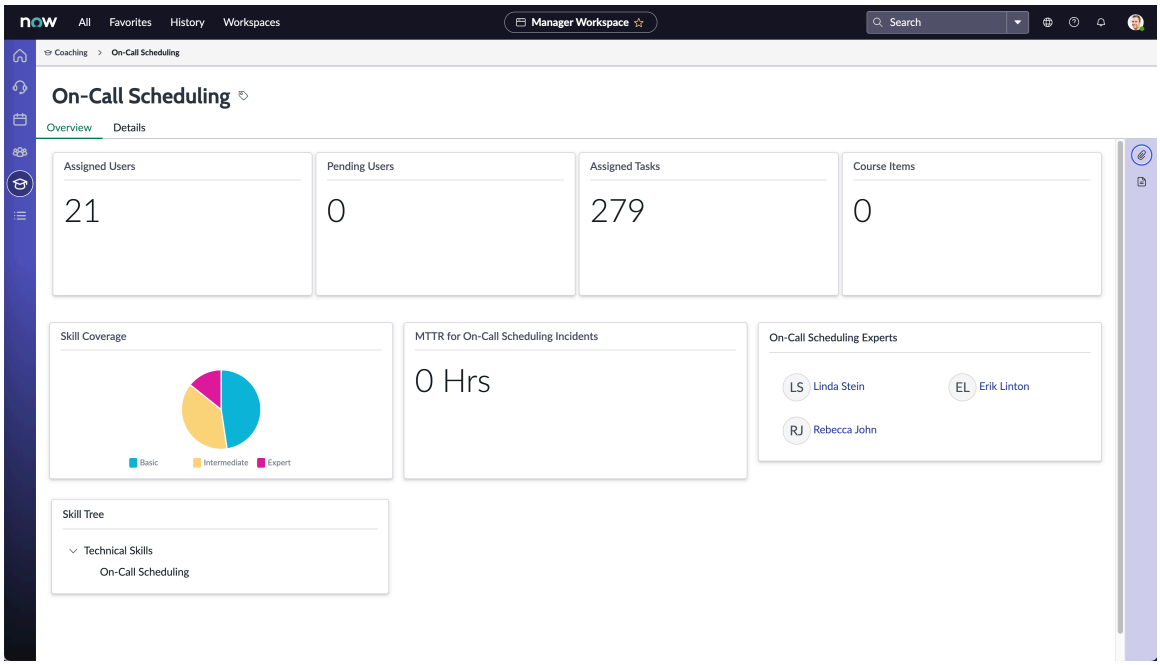
4. Click the **Skills** tab.
5. Select a skill.

You can access the Skills Overview page when you click on a skill in a user profile page in any Workforce Optimization for Customer Service application.

Note: You must enable the Coaching With Learning application to view the reports from the application. For enabling this application, see Activate Workforce Optimization for Customer Service.



Use cases

Use Cases

User	Landing page use
Skill Admin [skill_admin]	• Analyze all experts available for each skill. • Drill down into the skill hierarchy. • Number of skills assigned to users and tasks. • The mean time taken to resolve incidents for that skill. • Visualize how many users you have at different skill levels.

Indicators

MTTR of incidents of skill - Mean time taken to resolve incidents with this skill.

Breakdowns

The indicator is broken down by Skill.

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Components

Components

Component Name	Type	Description
Skill Overview Container [sn-manager-skill-overview-container]	Visualization components	Contains the following components: • Reports • Mean Time to Resolution (MTTR) indicator • Skill Coverage pie chart • Content tree • Skill Experts components
Skill Tree Connected [sn-manager-skill-tree-connected]	Tree	Displays the skill hierarchy. If the selected skill does not have a skill hierarchy then the component will not display on the Skill Overview page.
Skill Experts [sn-manager-skill-experts-connected]	List	Displays all users who are at the expert level for the skill.
Skill Coverage [now-uxf-visualization-connected]	Pie-chart	Displays the percentage as well as the number of users with different levels of expertise for the skill.

Reports

Important: The Pending Users and Assigned Tasks reports display when you enable the Coaching with Learning application from the ServiceNow® Store. To enable this application, see Activate Workforce Optimization for Customer Service.

KPIs

Title	Type	Source table	Description
Assigned Users	42	User Skill [sys_user_has_skill]	The number of users who have the selected skill assigned to them.
Assigned Tasks	42	Task Skill [task_m2m_skill]	The number of tasks for which this skill has been assigned.
Pending Users	42	Pending Users [sn_lc_learning_task]	The numbers of users who are yet to be assigned the selected skill from the learning task.
Course Items	42	Learning Course Item [sn_lc_course_item]	The number of internal and external courses that have the skill associated with the course item.

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Assess the quality of completed tasks

Assess the ability of your agents to resolve cases or the quality of their completed tasks.

Before you begin

You can create an assessment from an interaction or any task type.
When you manually create an assessment, you can add a survey to it. Coaching assessments also get created and assigned to the coach based on the trigger conditions that are defined in coaching opportunities.

Role required: sn_coaching.coach

Watch this short video to get an overview on coaching, assessments, and trainings.

About this task

If the coaching opportunity includes a survey, you can opt to take the survey and the assessment. When you use a survey to assess a trainee, the score for the survey is automatically calculated when you complete the survey. The assessment rating is then updated based on that score.

The Coaching Overview screen displays the average quality of the tasks that were completed in the past 30 days for your assignment groups.

- The donut chart displays the number of assessments in various states of completion. You can point to one of the states and click to open all assessments in that state.
- The bar chart displays assessments created by coaching opportunities. You can click on any of the data in the graph to access the assessments.
- You can click on the graph that displays the indicator data and access detailed information on the indicator.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Do any of the following.

To	Do this
Perform adhoc assessments	**a.** Click the Lists ( ) icon. **b.** Select any record, such as a case or interac tion, for which you want to create an assess ment. **c.** Select the Assessments ( ) icon. The assess ment screen appears in the right panel. **d.** Click the plus (+) icon.
Use assessments triggered by coaching opportunities	**a.** Click the Coaching ( ) icon. **b.** Select any record for which you want to create an assessment.

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To	Do this
	Note: Click the **Active Assessments** tab to view assessments of all teams for which you are a manager or an additional manager. **c.** Select a case to assess.

4. On the form, fill in the fields to assess the agent.

Assessment form

Field	Description
Opportunity	Coaching opportunity that is associated with the coaching assessment.
State	State of the assessment. ○ **Open**: New coaching opportunity ○ **Work in progress**: Trainee is being coached ○ **Resolved**: Trainee is assigned coaching programs and training modules. ○ **Closed Complete**: Assessment has been resolved and closed. ○ **Closed Incomplete**: Assessment that has been closed but not completed, typically because the coaching assessment **Due Date** has expired.
Assessment Rating	How well the agent resolved the incident. The Coaching application automatically populates this field when a coach completes a survey for the trainee.
Follow up	Whether the coach must take further action to improve the trainee performance.
Comments	Notes, if any, to add about the assessment.
Survey taken by coach	Survey for the trainee taken by the coach. You can add a survey for an assessment when you create the assessment manually or when the coaching opportunity triggers an assessment that does not have a survey. When a coaching opportunity triggers an assessment and contains a survey, the survey is automatically added to the assessment and cannot be changed by the coach.
Survey taken by trainee	Survey for the coach taken by the trainee.
Add skills	Skills to add to the trainee profile when the assessment is complete. When you click this field, it displays all skills and the skill levels that are not in the trainee profile.
Add training	Training to assign to the trainee. You can also assign learning tasks from course items.

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5. Do the following:
   - To complete the adhoc assessment, click **Save**.
   - To complete assessments creating using coaching opportunities, click **Complete assessment**.

Manage skills using Workforce Optimization for Customer Service

Add or update skills for an agent. You can approve predicted skills if the skill is necessary for the agent to complete assigned tasks. You can also reject a skill if it doesn't apply to the agent.

Before you begin

Role required: skill_manager

About this task

The Predictive Intelligence application for skills displays the recommended skills on each agent's profile. The application uses sample cases that the agent has worked on to recommend skills for an agent.

You can view skills for all users grouped by assignment group and the overall skill coverage for each group.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click the **Skills** tab.
   You can view the list of all assigned skills and the skill level for each agent on your team. For more information on skills and skills levels, see Skills Management.

   You can also filter the skill matrix based on users, groups, skill type, skill level, or skill category. Reset the filter if you want to view the skills for all users.
4. Add a skill or skill level.

To	Do this
Add a skill	**a.** In the skill matrix, click **Add** for the skill that you want to add to the agent. **b.** Select the **Skill Level** field and choose a level for the skill. **c.** Click **OK**. The skill gets automatically added to the agent.
Update a skill level	**a.** In the skill matrix, select a skill level for an agent. **b.** Select the skill level that you want to add for the agent. **c.** Click **OK**.

5. Approve or reject a skill that is recommended by Predictive Intelligence.
   a. In the skill matrix, click **Recommended** to approve and recommend a skill for the user.
   b. In the **Details** tab, review the request for skill approval, the sample case resolutions that were used to predict the skill, and the activity stream.

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- To approve a skill, click **Approve**. The skill is added to the agent and the lowest level for the skill is automatically associated with the added skill. The state for the request changes to **Approved** and the skill is added to the agent.
- To reject a skill, click **Reject**. The state for the request changes to **Rejected**. Predictive Intelligence does not recommend the skill for the user again and the field changes to **Add**.

- Click the More Options (•••) icon and select **Save**.

The application assigns the skill to the user. If the assigned skill does not have a skill level, the application adds the basic skill level to the user.

Coaching with Learning

Use Coaching with Learning to train your agents with internal and external learning content. Organize similar content in catalogs. Assign learning tasks and track completion.

> **Important:** Coaching with Learning is available when you enable the Coaching with Learning application from the ServiceNow® Store. To enable this application, see Activate Workforce Optimization for Customer Service.

Create a learning catalog

Create a catalog to organize related content into categories.

Before you begin

Role required: sn_lc.catalog_manager

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click the **Learning** tab.
4. Click **Learning Catalogs** and select **My Catalogs**.
5. Create a catalog.
   a. Click **New**.
   b. In the **Title** field, enter a unique name for the catalog.
   c. In the **Description** field, enter a description for the catalog.
   d. Click **Save**.

   > **Note:** The catalog is visible to all groups that you directly or additionally manage.

6. Add course items to the catalog.
   a. Click the **Content** tab.
   b. Click **Add**.
   c. In the **Add Learning Courses** pop-up window, select all course items you want to add to the catalog.
   d. Click **Add**. The course items are added to the catalog.

   > **Note:** To remove any course item you have added, select the course item and click **Remove**.

7. Add a group to a catalog.

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a. Click the **Applicable Groups** tab.

b. Click **New**.

c. In the **Group** field, select a group that you want to associate with the catalog.

d. Click **Save**.

Create a learning task

Create learning tasks for agents to keep track of their learning activities.

Before you begin

Role required: sn_lc.task_creator

About this task

Set learning task completion due dates to include or exclude weekends using the *exclude_weekends_on_learning_task_due_date* system property. For more information, see Workforce Optimization for Customer Service Reference.

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click **Learning Tasks** and select **All Tasks**.
4. Create a learning task.
   a. Click **New**.
   b. Fill in the following fields.

All tasks form fields

Name	Description
Assigned to	Name of the agent to whom you want to assign the learning task.
Course item	The course that needs to be completed by the agent.
Due date	Date when the agent must complete the course. Default is 5 days after the creation of the learning task. This value is calculated from the **Days to Complete** field for the course item. The due date field is highlighted as follows: ▪ Green—if the task is due before the current day. ▪ Yellow—if the task is due on the current day. ▪ Red—if the task is due after the current day.
Catalog	The catalog that contains the course item for the learning task.

5. Click **Save**.

Create internal learning content

Add internal courses so that agents can learn new content and enhance their skill set.

Before you begin

Role required: sn_lc.content_creator

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Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click **Learning Courses** and select **Internal Courses**.
4. Create an internal learning course.
   a. Click **New**.
   b. Fill in the following fields in the Details tab.

Internal courses form field

Name	Description
Title	Name of the course.
Internal source	Select the type of content for the course. Here are the available types of courses: ▪ URL—YouTube, Vimeo, or any link for a video ▪ Knowledge article ▪ Free form
Days to complete	The number of days required to complete the course. Default value is set to 5.
Estimated duration	Length of time when the course has to be completed. For example, for a video, it is the duration of the video. For a KB article, the duration is estimated based on the length of the article.
Description	Description of the course.

5. Select **Save**.
6. Add a skill to the internal content.
   a. Select the **Associated skills** tab.
   b. Select **New**.
   c. In the **Skill** field, select a skill you want to associate with the internal content.
   d. In the **Skill level** field, select a skill level for the selected skill.
   e. Select **Save**.
7. Add a learning task to the internal content.
   a. Select the **Learning Tasks** tab.
   b. Select **New**.
   c. In the **Assigned to** field, select a trainee to whom you want to assign the learning task.
   d. In the **Catalog** field, select the catalog to associate with the learning task.
   e. In the **Due date** field, select the calendar icon and select the date and time when you want to trainee to complete the learning task.
   f. Select **Save**.

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Add external courses to coaching with learning

Add courses from external sources such as Udemy, Pluralsight, or Cornerstone to enable your users to gain skills from external content.

Before you begin

Role required: sn_lc.learning_admin

Procedure

1. Navigate to **Workspaces** > **Manager Workspace**.
2. Click the Coaching ( ) icon.
3. Click the **Learning** tab.
4. Go to **Learning Courses** > **External Courses**.
5. Select a course.
6. Click **Go to course**.
   You can review and learn the external course.

Mobile experience for Workforce Optimization for Customer Service

Manage customer service cases from your mobile device with the Now Mobile Agent application. You can stay connected and access information in real time so that you can complete your tasks quickly.

If you're an agent (sn_customerservice_agent) or a manager (sn_wfo_csm.manager), you both can use real-time notifications from the application to take action on an issue. Before you can do so, you must activate the Customer Service Mobile Plugin (com.sn_csm_mobile). For more information about the Now Mobile for Customer Service Management, see Mobile experience for Customer Service Management

- To get started with this application, follow the instructions in Get started with the Customer Service mobile application.
- You can learn about the agent and manager tasks that you can perform in Use the mobile application to perform agent and manager tasks. Additionally, you can also perform the following tasks for Workforce Optimization for Customer Service.

Agent tasks

Agent tasks	Action	Description
Approve or reject shift-swap request	• Tap the notification. • **Approve** or **Reject** the shift-swap request.	Agent receives notification that the shift swap request is either approved or rejected.

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Manager tasks

Manager tasks	Action	Description
Approve or reject time-off request	• Tap the notification. • **Approve** or **Reject** the time-off request.	Agent receives notification that the time-off request is either approved or rejected.
Approve or reject shift-swap request	• Tap the notification. • **Approve** or **Reject** the shift-swap request.	Agent receives notification that the shift swap request is either approved or rejected.
View critical and high priority cases that breached SLA	Tap the notification. The case record appears.	Review the case record and take appropriate action.

Scheduling in Workforce Optimization for Customer Service

Learn how you can plan shifts that include break time for your agents to effectively manage their schedule in Workforce Optimization for Customer Service. Publish schedules to view the agent schedules on the team calendar.

Manage the scheduling for your organization from a central location. Scheduling makes managing team calendars transparent and collaborative between managers and agents. Use On-Call Scheduling with Workforce Optimization for Customer Service to have dedicated team members to resolve issues as they arise.

Managers can use demand forecasting feature to view their agent staffing forecast at 15-, 30-, and 60-minute intervals on the team calendar. Managers can monitor real-time schedule adherence of the agents using clock-in and clock-out events.

Scheduling provides the following capabilities based on your role:

Role based scheduling capabilities

Personas	Capability	Description
Scheduler (`sn_shift_planning.admin`)	Plan	Create shift plans that stagger breaks to support coverage.
	Schedule	Create schedule plans, view them, and publish the schedule for the next time period.
	Manage	Create time-off requests and swap shifts for your agents.
	Forecast	Model demand scenarios to analyze agent forecast and view updated demand on the calendar.
Agent (`sn_shift_planning.agent`)	View team schedule	View when your peers are working and when they are taking time off.
	Add events	Create events such as a meeting, training, or an ad hoc work shift.

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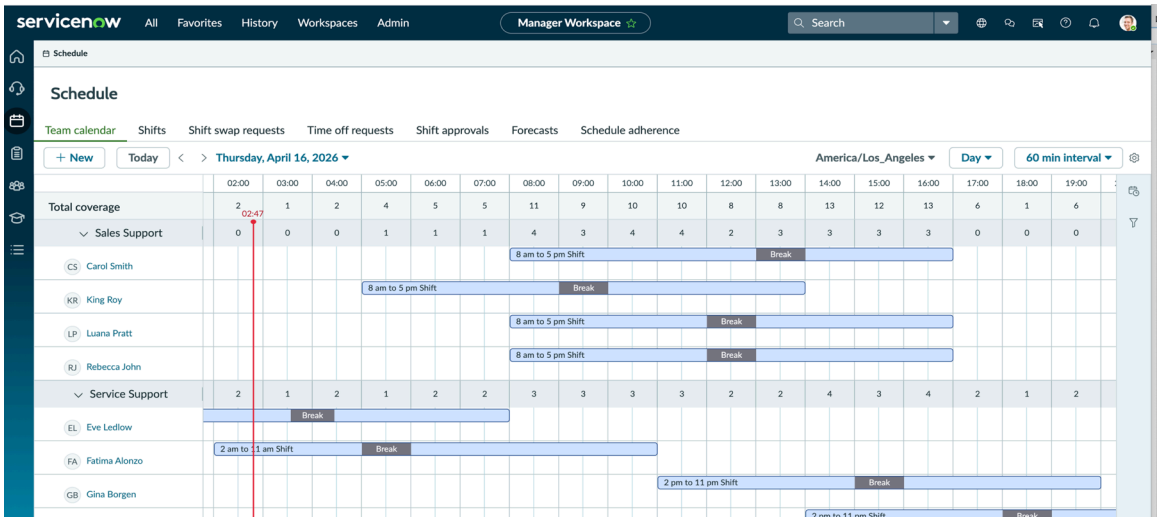
Role based scheduling capabilities (continued)

Personas	Capability	Description
	Request time off	Send a request for the span of time you want to take off.
	Swap shifts	Trade shifts with your peers.

The image below provides a high-level overview of the tasks schedulers and agents can perform on the calendar.



As a manager, you can:

- Create shifts to ensure customer coverage for the required span of time.
- Add breaks to the shifts that automatically stagger agent availability for those shifts.
- Preview the schedule and make necessary changes before publishing it to your agents.
- Access the schedule of all of your teams from one location.
- Modify the planned schedules when your team members inform you about their changed availability.
- Manage the schedules of team members working across different time zones.
- Monitor schedule adherence of your agents looking at the time worked summary and time attendance.
- Filter the members based on location, skills and assignment groups.
- Adjust the planned schedules and manage approvals through mobile application.
- Create on-call shifts and assign primary, secondary rotation groups to handle escalation scenarios.

As an agent, you can:

- Look up your schedule and request time off when required.
- Swap your shift with one of your peers.
- View your calendar and your team's calendar across the weeks to plan your work.
- Synchronize your team calendar and events with Microsoft Outlook.

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Example

A manager for a large Customer Service operation is responsible for 12 teams. Each team has from 8 through 15 agents. At any given point, the manager needs visibility into the teams' schedule. The manager must also be able to create shifts, and approve or reject shift-swap or time-off requests from the team.

The manager can manage the teams' schedule using **Scheduling**. Team members can also manage their own schedules effectively by requesting shift-swaps or time off.

The manager can review schedules by performing the following steps from one central location:

1. Create shift plan.
2. Create a schedule plan.
3. Assign agents to work shifts.
4. Publish the schedule.
5. Approve teams' requests.

Agents make requests to change the schedule or take time off. For more information, refer to Track and manage your team schedule.

Get an overview of how to you can create shift plans and assign agents to the shifts using the schedule plan. For more information, refer to Create Shift Plans on YouTube.

Get an overview of how you can monitor shifts and schedule for your entire team from a single location. For more information, refer to Monitor Team Schedule on YouTube.

Get an overview of how agents use the workspace to manage their schedule. For more information, refer to Agent Schedule on YouTube.

For detailed information on creating and managing schedules using Workforce Optimization for Customer Service, refer to Scheduling in Workforce Optimization for Customer Service.

Related topics

Setting up Scheduling in Workforce Optimization for Customer Service

Scheduling in Workforce Optimization for Customer Service

Forecasting in Workforce Optimization for Customer Service

Use the Forecasting page to monitor staffing levels and volume forecast trends for your assignment groups.

The Staffing and Volume Overview page in the Manager Workspace brings staffing and volume data together in a single view. Managers can switch between two charts to understand both their staffing position and the incoming workload driving it, without navigating to separate pages.

Staffing chart

The Staffing chart displays a bar chart comparing two data series for your selected time period and groups:

- **Scheduled staff** (blue bars) — The number of agents currently scheduled in your assignment groups.
- **Required staff** (orange bars) — The number of agents required to meet forecast demand, calculated from the configured resource conversion formula.

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Chart buckets align with coverage timestamps so that scheduled and required staff data appear in the same intervals. When the selected date range spans more than one day, axis labels include the date alongside the time, for example, `Aug 10 08:00`.

Volume chart

The Volume chart displays two series across the selected time period:

- **Historical volume** — Actual case and interaction volumes at the selected interval granularity.
- **Forecasted volume** — Predicted contact volumes generated by the Agent Forecast algorithm.

The **Data collection definition** filter lets you scope the volume chart to specific channels. Changing the definition filter re-aggregates from cached data without a full reload. Hover over any data-point to see the volume value at that interval.

Related topics

Monitor staffing and volume forecast data

Monitor staffing and volume forecast data

Monitor staffing levels and volume trends to identify gaps and optimize resource allocation for your assignment groups.

Before you begin

Role required: *sn_agent_forecast_user*

About this task

The Staffing and Volume Overview page displays two charts under a shared filter bar. The **Staffing** chart shows scheduled vs. required staff for your selected date range and groups. The **Volume forecast** chart shows historical and forecasted contact volume. Both charts update when you change the shared filters. The volume chart also has its own **Data collection definition** filter.

Procedure

1. Go to **Workspaces** > **Manager Workspace**.
2. Select the **Forecasting** icon ( ) to open the Staffing and Volume Overview page.
3. Set the date range for the data you want to view.

   Select the **Start date** and **End date**, or select from the following:

   - **Last Day** — Sets both dates to today.
   - **Current Week** — Sets the range to the current week, Sunday to Saturday.
   - **Next 28 days** — Sets the range to the next 28-day period.
   - **Custom** — Opens a calendar picker to select specific start and end dates.
4. Select **Interval**.

   The default is 60 minutes.
5. Select the required **Assignment group**.
6. **Optional:** Set the **Data collection definition** for the **Volume forecast** chart to scope the volume data to specific channels.
7. **Optional:** Select **Reset filters** to restore the filters to their defaults.

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Result
Both charts update to reflect the selected filters.

The **Staffing** chart displays two bar series:

- **Scheduled staff**- The number of agents currently scheduled.
- **Required staff**- The number of agents required to meet forecast demand.

The **Volume forecast** chart displays two series:

- **Historical volume**- Actual case and interaction volumes from MetricBase.
- **Forecasted volume**- Predicted contact volumes from the Agent Forecast algorithm.

Schedule Adherence in Workforce Optimization for Customer Service

You can use schedule adherence to monitor whether your team members are adhering and conforming to the schedules and to improve the operational efficiency of your organization.

Clock-in and clock-out events are generated as agents change their availability status. The time between the clock-in and clock out events are aggregated to create schedule adherence and conformance reports.

Adherence measures how closely agents follow their schedule to complete their assigned work. Conformance measures the agents' total time at work compared to the total scheduled time period, regardless of adherence.

Schedule adherence helps your organization to do the following actions:

- Measure whether the effort spent on demand forecasting and scheduling team members is used in an optimal manner.
- Plan for more effective staffing needs in the future based on your insights into the historical use of agent resources.
- Discover coaching opportunities for your agents when there are gaps in their adherence. For more information, see Using Coaching in Workforce Optimization for Customer Service.

As a manager, you can do the following actions:

- Access the schedule of all of your teams from one location and gain insights on whether your team is complying with published schedules.
- Increase your team's performance by setting expected adherence targets.
- View the time attendance of your agents by looking at such details as clock-in and clock-out times.
- Analyze the historical time attendance of your team members.
- View planned versus actual historical data for your team and individual agents.
- Modify the clock-in and clock-out times of your agents.

As an administrator, you can set the threshold percentages and change the formulas for calculating schedule adherence and conformance.

Schedule Adherence for Customer Service in action

Watch this short video to understand how managers and agents use Schedule Adherence in Workforce Optimization for Customer Service

Consider the following steps to determine the schedule adherence and conformance:

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1. The administrator sets the *`Agent Time Work Event Trigger`* business rule as active to record the clock-in and clock-out times of customer service agents.
2. An agent works for the Customer Service operations team and reports to a manager. Let's assume this scenario is a typical work day:
   a. The agent logs in to CSM Agent Workspace.
   b. The agent changes the presence status to **Available** and starts work. The clock-in event gets generated.
   c. The agent changes the presence status to **Break** and goes for lunch. The clock-out event gets generated.
   d. When the agent comes back from lunch and answers a phone call, the presence state becomes **Busy** and the clock-in event gets generated.
   e. The agent then logs out from CSM Agent Workspace or changes the presence status to **Offline**. The clock-out event gets generated.
   f. At the end-of-the-day, the agent's time worked summary is generated with key performance indicators (KPIs), such as Start Time, End Time, Planned Work, Time Not Worked, Available Non Planned Time, Time Worked, and Adherence%, Conformance %.
3. The agent's manager logs in to Manager Workspace to view the agent's time worked in the **Team Calendar**. The manager can also view the agent's actual time worked and working pattern for all historical days. If required, the manager can coach the agent to a desired performance that fits in with the team culture.

Related topics

Configure properties for schedule adherence and conformance

Monitor schedule adherence of your agents

Analyze adherence and conformance from the time worked summary

Work scheduler in Workforce Optimization for Customer Service

Manage the work of all your teams from a central location. You can get visibility into your entire teams' workload. From your team's calendar, you can assess the task complexity level and work capacity, and assign or reassign work.

Important:

Starting with the Brazil release, Work scheduler is no longer deployed, enhanced, or supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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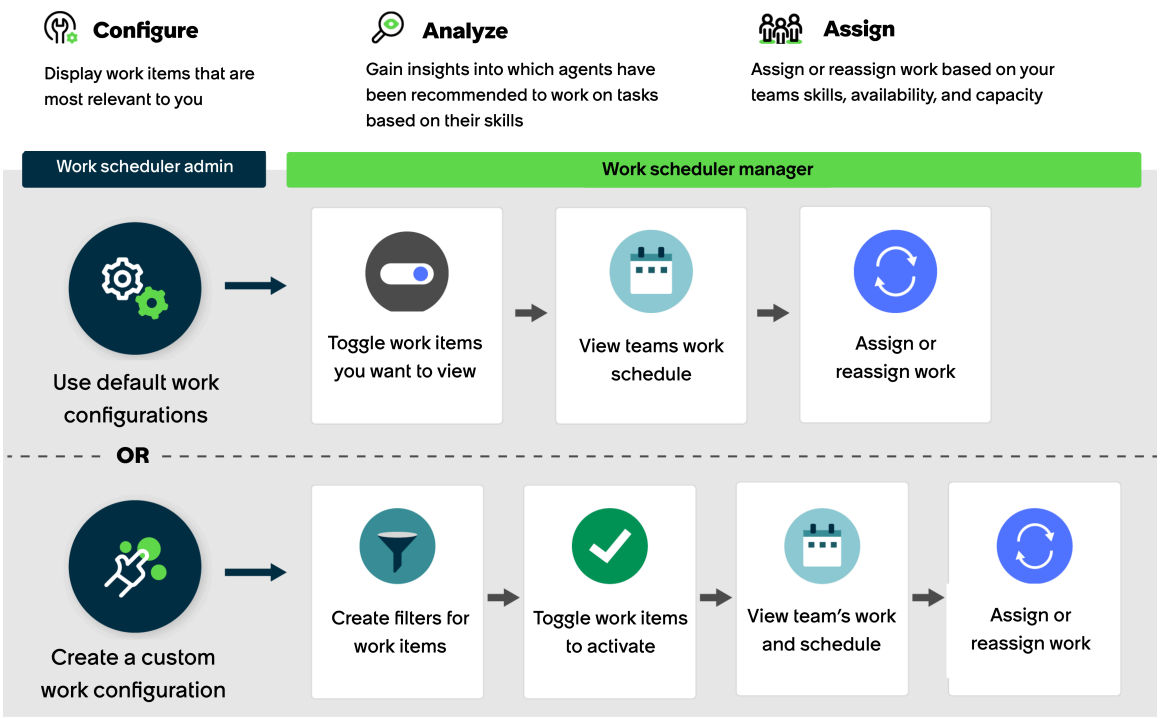
The following image provides a high-level overview of Work scheduler.



As an administrator, you can:

- Create work configurations that managers can view in their work queue. For information on setting up work configurations, see Set up a work configuration.
- Create work scheduler cards and configure them based on your needs. For more information, see Create a Work scheduler card using the Next Experience UI Builder.
- Associate the work scheduler cards with work configurations. For more information, see Associate a work scheduler card to the work configuration.

As a manager, you can:

- Create custom preset filters to prioritize your work items based on what's important for you.
  - You can define the filters based on task type. For example, you can set filters for incidents that are categorized as Priority 1 and Priority 2.
  - You can also define filters based on use cases. For example, if you want to prioritize catalog tasks from a VIP business unit over other units, you can define those conditions for the filter.
- Configure your work queue to display the most relevant work items.
- Assign or reassign work items based on your teams' shifts, and skill recommendation.
- Assign work items based on your teams' shifts.
- Add criteria for matching rules and then rank team members and assign work items based on those rules.

Getting started with Work scheduler in Workforce Optimization for Customer Service

Easily find tasks you need to complete in the Scheduling module.

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Work scheduler

Benefit	User	Finding tasks to complete in Work scheduler
Activate Work scheduler in Workforce Optimization for Customer Service.	admin	Activate Work scheduler
Refer to the components such as system properties used in Work scheduler.	Any Work scheduler role	Understand components used in Work scheduler in Workforce Optimization for CSM
Set up Work scheduler for the Work scheduler managers so that assign work items based on their teams' skills, availability, and capacity.	Work scheduler admin	Set up Work scheduler in Workforce Optimization for CSM
Manage your teams' work assignments easily by customizing your work queue to display the most relevant work items.	Work scheduler manager	Use Work scheduler in Workforce Optimization for CSM

Demand Forecast in Workforce Optimization for Customer Service

Demand Forecast enables managers to view their agent staffing forecast at 15-, 30-, and 60-minute intervals on the team calendar. This feature enables managers to adjust and prioritize schedules, tasks, breaks, and meetings for their agents without impacting service objectives. Learn how you can use Demand Forecast to predict resources based on historical data.

Overview of the Demand Forecast application.

The 15-, 30-, and 60-minute intervals are color-coded to display the status of agent staffing such as understaffing, overstaffing, and well staffed. Understaffed slots are color-coded red, overstaffed slots are color-coded yellow, and well-staffed slots are color-coded green. Slots that do not need staffing are color-coded grey. Managers must ensure adequate staffing in understaffed slots and optimize the resources in overstaffed slots.

For example, a manager of the Service Support group can see that the slot between 07:00 and 07:15 is color-coded red and is understaffed. The demand is for nine resources and the coverage is eight resources. The slot is understaffed by one resource. That slot displays **9** and **-1**. To avoid the understaffing of that slot, the manager allocates a resource who is on a break. The manager reschedules the break of that resource from 07:00 to 07:30. The 07:00 to 07:15 slot is now well staffed and color-coded green.

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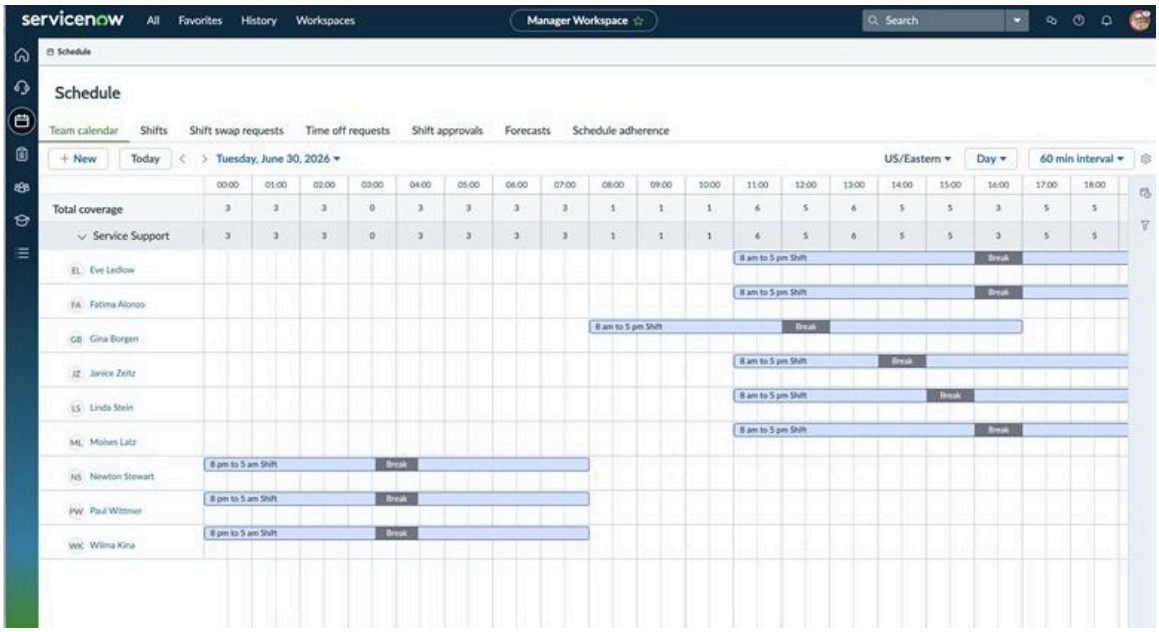
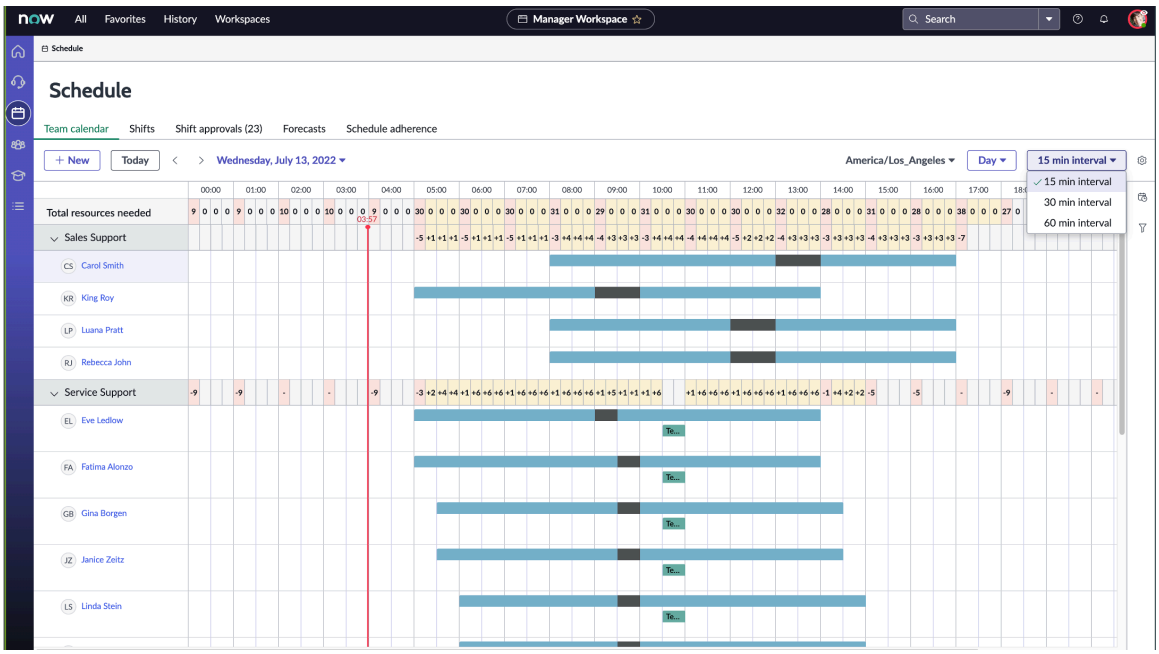
Demand Forecast view for a team



The manager of all the teams can view the staffing forecast of the teams and at the individual level in the 15-, 30-, and 60-minute intervals according to the requirement. This view helps managers to staff their teams adequately.

Demand Forecast view for all teams



The Demand Forecast application uses MetricBase to forecast the demand for teams.

When you create Demand Forecast configurations, the application creates these metrics:

- Staffing forecast: The forecast on the number of agents that a manager must handle cases and interactions in 15-, 30-, and 60-minute intervals.
- Volume forecast: The historical data and the forecast of the contact volumes (cases and interactions) at 15-minute intervals.

Note: You can create forecast configurations for any table.

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Analyzing Demand Forecast resource prediction

https://player.vimeo.com/video/1193265631?h=54dab503fc&badge=0&autopause=0&player_id=0&app_id=58479

As a manager with the forecast admin role, you can create forecast parameters in the Manager Workspace. Modify forecast parameters to visualize forecast data and preview time-series data before publishing it. You can create any number of forecasts to preview the time-series data in real time.

You can also make manual adjustments to tweak the forecast and analyze the forecast pattern. Overlay the manual adjustments on the visualized forecast data and view the time-series data to analyze the forecast model. For example, you have a specific pattern for the upcoming week that has a national holiday in the middle of the week where you need more agents. Because you expect the sales to go up, you can manually tweak the forecast to increase it by 10% and analyze that data.

Demand Forecast

The Demand Forecast application includes the following modules:

Demand Forecast application modules

Module Name	Description
Data Collection Definitions	Set conditions to define the data that you want to collect for cases, interactions, or any table.
Formula Parameters	Add the parameters to be defined in the formula to calculate the resources from the forecast.
Resource Conversion Formula	Add formulas to convert forecast to resources at 15-, 30-, and 60-minute intervals.
Group Forecast Configuration	Associate the configured formula for resource conversion to groups.

As a user with the sn_agent_forecast.admin role, you can forecast the number of agents that you need for a shift.

To forecast the demand:

1. Collect data by defining data collection definitions.
2. Set values for forecast parameters and generate volume forecasts.
3. Create formulas to convert volume forecasts into the number of resources that you need at 15-, 30-, and 60-minute intervals.
4. Associate the formulas to assignment groups.
5. View the predicted demand on the calendar.

Note: See the Demand Forecast section in Components installed with Workforce Optimization for Customer Service for information on the default components and configurations.

Collect data by defining data collection definitions

Use the Data Collection Definitions module to define the data that you want to collect for forecasting agents.

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- Use the *`Collect daily data for automated forecast configurations`* scheduled job to gather data for the metrics defined in the data collection definitions. The scheduled job fetches the records from the previous day for every 15-minute interval for all assignment groups and stores it in the MetricBase.

  You can access the time series for the collected data using the MetricBase `list` in the Group [sys_user_group] table. For more information on accessing MetricBase data, see Access MetricBase data using the list command.

- Use the *`Collect historical data for automated forecast configurations`* on-demand job to collect historical data at 15-minute intervals. This job collects data for the past three years.
- Use the *`Forecast resources for future`* scheduled job to forecast the resources based on the collected data and stores the data in the Agent Forecast metric in MetricBase. See Forecast properties to set the collection frequency such as the number of days that you must collect the data to calculate the forecast or the time period that you want to store the data for.

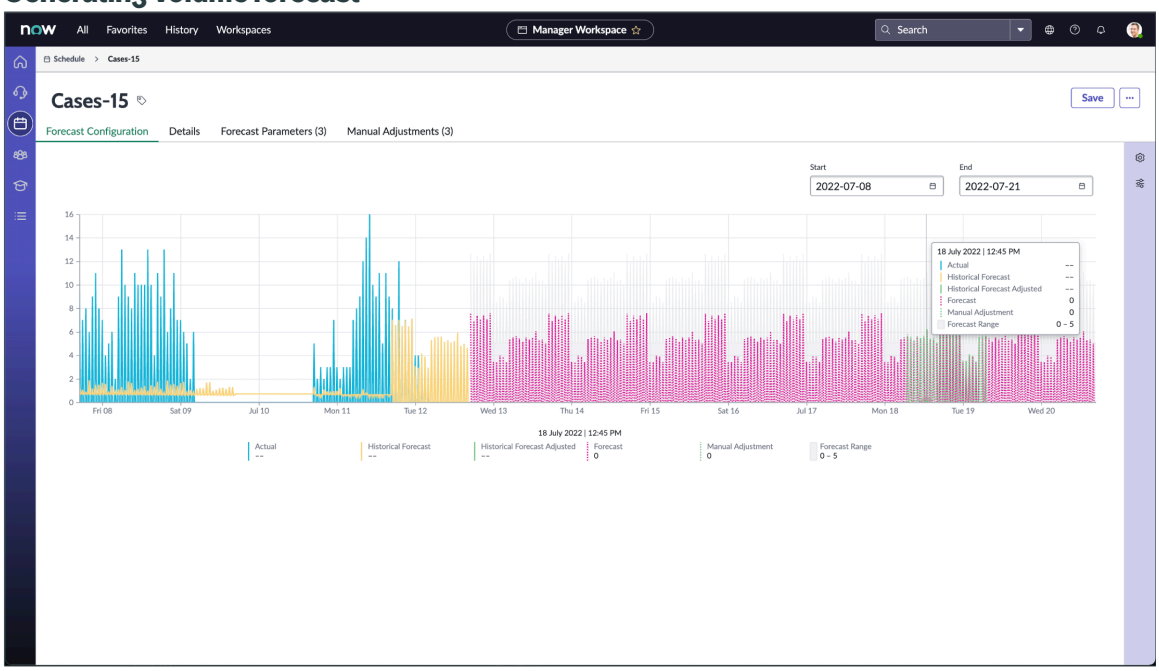
Note: The time series metrics created for data collection definitions use the WFO Forecast retention policy. This policy stores data at a one-hour interval for the past three years.

Create forecast parameters

Managers can collect historical data at 15-minute granularity for generating accurate forecasts. The forecasts generated show the patterns in cases and interaction volume at 15-minute intervals. By default, the application uses the Seasonal Trend Loess (STL) algorithm.

For example, a manager can generate the volume forecast at 15-minutes intervals by providing the appropriate forecast parameters. Forecast parameters consist of the period length and periods to forecast that are most suitable for the pattern observed in the contact volumes.

Generating volume forecast



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Create formula parameters

Use numeric values or a script to be defined in the formula to calculate the resources from forecasts. Units in formula parameters can be specified in hours, minutes, or absolute numbers. See Formula parameters for the parameters that are available by default.

Create formulas to convert forecast to resources

Build formulas to convert the volume forecast to the staffing forecast at 15-, 30-, and 60-minute intervals. See Resource Conversion Formula for the configured resource forecast formulas that are available by default.

Associate formulas to assignment groups

Associate assignment groups with the resource conversion formula to convert the number of cases and interactions to the number of agents.

View the predicted demand on the calendar

The data collected by the Agent Forecast metric in MetricBase is used to forecast the agents that you need for each 15-, 30-, and 60-minute interval in a day on the team calendar. In the Week and Month views for the calendar, it displays the staffing levels for a given week and month respectively.

Daily Data Collection for Demand Forecasting Definitions

As a WFO admin, you need to configure assignment groups associated with Workforce Optimization (WFO) by provisioning *sn_wfo_cfg_ws.manager* role to manager or additional manager of those groups. The historical or daily data collection can be collected only for WFO Assignment groups to support demand forecasting.

Note: If you need to add new assignment groups after the historical or daily data collection job has already been run, update the corresponding data collection definition by setting the *is_historical_data_collected* flag to false and the duration to 0. After making these changes, rerun the historical data collection job to ensure that historical data is collected for the newly added groups, maintaining the accuracy and completeness of demand forecasts.

Related topics

Configure the data collection for resources demands

Analyze staff alignment using Demand Forecast

Workforce Optimization for CSM Agent Workspace

Manage your profile and schedule using Agent Workspace. Use coaching to review and complete assigned training.

Important: To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

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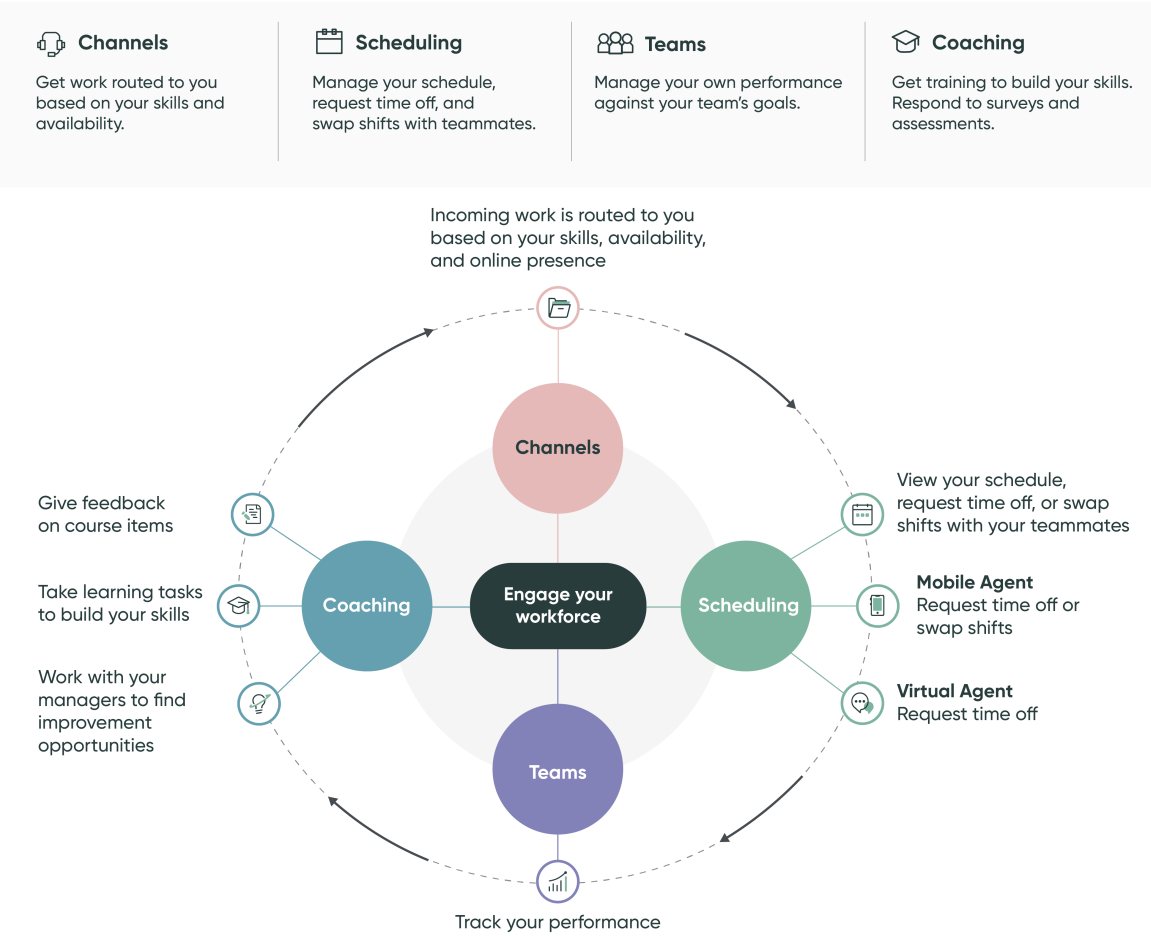
The image below displays the agent work flow between the different modules in Workforce Optimization for Customer Service.



The Workforce Optimization for Customer Service features are accessible when the administrator activates the plugin (com.snc.wfo_csm). This plugin activates related plugins that enable agents to use the Channel Management, Scheduling, Coaching, and Teams applications in Workforce Optimization for Customer Service.

Access your profile from CSM Agent Workspace

Track and monitor the real-time status of your work by accessing your profile in CSM Agent Workspace. You can track information such as how many cases and interactions you have closed and how many you are actively working on. You can also view the roles and groups to which you belong and see information about your manager and teammates.

Before you begin

Important: To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_wfo_csm.employee

About this task

Access your profile to analyze information such as:

- Key performance indicators that matter most to you.
- Pending training that has been assigned to you and when they're due.

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- The service channels you are assigned to and their current utilization.
- Skills and skill levels that you currently use and skill gaps that you may want to address.
- Upcoming PTO.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Lists icon.

To	Do this
Access your profile from a case record	**a.** Click **Cases** and select **Assigned to me**. **b.** In the **Assigned** column, select your name. The profile page appears. In that page, you can access all the information related to your pro file.
Create your profile for centralized access	**a.** Select the **My Lists** tab. **b.** Click **New List**. **c.** In the **New List** screen, click **Create your own**. **d.** In the **List Name** field, enter a name for the list; for example, My Profile. **e.** In the **Select Source** field, select **User** (sys_user). **f.** In the **Add Filters** condition builder, select **[Name] [is] [<your name>]**. **g.** Click **Create**. The workspace adds your profile to the **My Lists** tab. For information on creating a list, see Adminis

Manage your schedule from CSM Agent Workspace

Look up your schedule, request time off, or swap your shift with your peers using the calendar in CSM Agent Workspace. If you can work during the requested shift, you can also approve your peer's request for shift swap.

Before you begin

Important: To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_shift_planning.agent

About this task

You can swap shifts with agents that are within your assignment group.

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Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Calendar icon.

   You can access your schedule in the **My Calendar** tab. If you want to see a list of all agents in your assignment groups and their schedules, click the **Team Calendar** tab.

   To view your schedule or another agent's schedule, you can:

   - View your schedule by clicking the **My Calendar** tab. Then, use the list menu to select the schedule that you want to view by day, week, or month.
   - View another agent's schedule by clicking the **Team Calendar** tab. Then, click an agent's schedule to see that agent's work and break times by day, week, or month.

     Select one of the following in the drop-down:

     Calendar views on the Team Calendar tab

Calendar view	Description
Day	The hourly calendar of the current day displays. In the calendar drop-down, select a date to view the respective day's schedule.
Week	The current week's calendar displays. In the calendar drop-down, select a date to view the weekly schedule containing the selected date.
Month	The current month's calendar displays which includes current week and upcoming three weeks (28 days) in a single view. In the calendar drop-down, select a date to view that respective month's calendar.

   Select the **Today** button to view the current day.
3. Make a request.

   You can communicate with other agents by using Connect Chat or the activity stream on the record to make sure that they would like to swap the requested shift with you.

   Connect Chat and activity stream request options

To	Do this
Request a shift swap	**a.** Click **Request shift swap**. **b.** From the Shift menu for your shift, select the shift that you want to swap with another agent. **c.** In the**Agent** field for the requested shift, select the agent that you want to swap with. **d.** From the Shift menu for the requested shift, select the agent's shift that you want to swap with. **e.** Click **Submit**.

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To	Do this
Request a time off	**a.** Click **Request time off**. **b.** From the **Start time** field, enter the time that you want your time off to start. **c.** From the **End time** field, enter the time that you want your time off to end. **d.** Click **Submit**.

- The shift-swap request moves to the approval queue of the agent that you have requested to swap with.
- The time-off request moves to your direct manager's approval queue.

Clock-in and clock-out your work shift

Clock in and clock out your work shifts using CSM Agent Workspace. You can track your details, such as time attendance and time worked summary, to know how close you are adhering to your schedules.

Before you begin

Important: To access the next generation of the Workforce Optimization for Customer Service application, transition to the Workforce Optimization for Customer Service application that is available from the ServiceNow Store. You can now configure Workforce Optimization for Customer Service using the UI Builder. For more information see, Workforce Optimization for Customer Service.

Role required: sn_shift_planning.agent

About this task

The clock-in event is generated when you either login or set your status as **Available** in CSM Agent Workspace. The clock-out event is generated when you either logout from CSM Agent Workspace or set your status as **Offline** or **Break**.

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Inbox icon.
   - To clock-in your shift, set your status to **Available**.
   - To clock-out from your shift, set your status to **Offline** or **Break**.

Result

You can view your time attendance and adherence in **Lists** > **Schedule Adherence** > **Time Attendance** and **Time Worked Summary** lists.

Approve or reject a shift swap from CSM Agent Workspace

You can approve a shift swap requested by your peer if you are available to work for that time period. You can reject it if you are unable to work then.

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Before you begin

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Role required: sn_shift_planning.agent

Procedure

1. Navigate to **All** > **Workspace Experience** > **Workspaces** > **Agent Workspace Home**.
2. Click the Lists icon.
3. Go to **Approvals** > **My Approvals**.
4. Select the request you want to approve or reject.
5. Review the details of the shift swap request and do one of the following:
   - To approve the request, click **Approve**.
   - To reject the request, click **Reject**.

   If you approve a shift swap, the application moves the request to your manager's approval queue. For more information, refer to Scheduling in Workforce Optimization for Customer Service.

Customer management

Enhance customer engagement and satisfaction by managing all interactions to ensure a seamless and efficient service experience. Simplify processes, improve communication, and provide personalized service.

Customer management

Using customer access management	Learn how customers, contributor users, and customer service agents use customer access management.
Using Customer Contracts and Entitlements	Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate service contracts and contract lines to work on the services.
Create a social media profile	Users with the customer service manager role can create a social media profile for an account, contact, or consumer.
Create a social media log entry	Users with the customer service manager role can create a social media log entry for a case.
Using customer data models for B2B2C	With the B2B2C model, organizations across industries can easily configure multi-level customer relationships and support business customers who, in turn, support their end consumers.

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Using customer access management

Learn how customers, contributor users, and customer service agents use customer access management.

Overview of customer access management

Customer access management enables you to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case. You can also add additional internal users to a case.

Related topics

Configuring customer access management

Restrict contact access

Add related parties to a case

Add related parties to a case to help provide the access level to the related parties, such as contacts or consumers on a case.

Before you begin

Role required: sn_customerservice_agent

About this task

Related parties and their assigned responsibilities are part of the Customer Access Management feature. Customer access management enables you to support multiple contacts and consumers on cases and sold products, providing them with varying levels of access to the case. For more information, see Configuring Customer Access Management.

Related parties that are added to cases must also be assigned the sn_customerservice.case_authorized_contributor role.

Procedure

1. Navigate to **All** > **Customer Service** > **Cases** > **All**.
2. Select the case where you want to add related parties.
3. From the Related Parties related list, select **New**.
4. On the form, fill in the fields.

Related Party record form

Field	Description
Type	Related party type. The related party type can be a contact, consumer, or a contributor user. You can select from the list of related party configurations for the cases that are provided with the base system. ○ Authorized Contact ○ Authorized Consumer ○ Authorized Contributor ○ Listed Contact ○ Listed Consumer
Case	Case number.

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Field	Description
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   Related parties are added to the case.
6. Confirm that the contact or consumer selected in step 4 is assigned to the sn_customerservice.case_authorized_contributor role.

Result

Once related parties are added to the case with a proper functional role having Authorized Representative responsibility, they can perform the following actions.

- Close a case.
- Update customer-visible case tasks.
- Add additional comments and attachments.
- Accept or reject a solution.
- Receive notifications on case updates. To confirm that related parties receive email notifications, add them to the email notification configuration.
  1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
  2. Select a notification.
  3. In the Who will receive related list, select the lock icon next to **Users/Groups in fields**.
  4. In the Available column, select **Related Party Users** and/or **Related Party Consumers** and move them to the Selected column.
  5. Select the lock icon again and update the record.
  6. Repeat these steps for each of the desired notifications.

Related topics

Case update notifications

Case update notifications

Contacts, consumers, and contributor users assigned the Authorized Representative responsibility on a case receive all email notifications sent to the case's primary contact.

Contacts added as additional contacts to the sold product with the Authorized Representative responsibility receive all email notifications sent to the case's primary contact.

Consumers added as an additional consumer to the sold product with the Authorized Representative responsibility receive all email notifications sent to the case's primary consumer.

Internal users added as related parties to a case with the Authorized Representative responsibility receive all email notifications sent to the case's primary contact or consumer.

For case resolved emails, related parties with the Authorized Representative responsibility can accept or reject the proposed solution. The responses of emails from related parties are treated similarly to the primary contact or consumer on the case. For more information, see Create an email notification.

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Enable case update notification

To receive notifications when a customer replies to a case, related parties added to cases must be assigned a Customer Access Management (CAM) role, such as the sn_customerservice.case_authorized_contributor role. For more information, see Roles installed with Customer Access Management.

Configure notifications for related parties

Related parties added to cases can receive email notifications on case updates. To enable the configuration, add related parties to the email notification configuration.

1. Navigate to **All** > **System Notification** > **Email** > **Notifications**.
2. Select a notification.
3. In the Who will receive related list, select the lock icon next to **Users/Groups in fields**.
4. In the Available column, select **Related Party Users** and/or **Related Party Consumers** and move them to the Selected column.
5. Select the lock icon again and update the record.
6. Repeat these steps for each of the desired notifications.

Adding related parties to a sold product

Add related parties to a sold product to help provide the access level to the related parties, such as contacts, consumers, or accounts.

For example, products purchased by a customer can be tracked by multiple departments, such as the finance team monitoring renewals and the operations team overseeing maintenance.

With Customer access management, you can add multiple related parties and provide them with varying levels of access to the sold product. While adding related parties, you can select the related party type and responsibility.

Task	Description
Add additional consumers for the sold product	Add additional consumers for sold product and the related entities by defining the type and responsibility of additional consumers.
Add additional contacts for the sold product	Add additional contacts for sold product and the related entities by defining the type and responsibility of additional contacts.
Add additional accounts for the sold product	Add additional contacts for sold product and the related entities by defining the type and responsibility of additional accounts or contacts.

Add additional consumers for the sold product

Add additional consumers for your business-to-consumer (B2C) or business-to-business-to-consumer (B2B2C) sold products by defining the type and responsibility of additional consumers. After you add this information, additional consumers can have the same access to the consumer associated with the sold product and the related entities.

Before you begin

Role required: admin and sn_customerservice_manager

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About this task

The responsibility assigned to the additional consumer that is associated with a sold product gets access to the sold product and the related entities, which include installed products, install base items, and cases associated with sold products.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the desired record where you want to add additional consumers.
3. From the Additional Consumers related list, select **New**.
   Starting with the Utah release, the Additional Consumers related list has been deprecated for new customers. For upgrade customers, the Additional Consumers related list continue to be supported along with the Sold Product Related Parties related list.
4. On the form, fill in the fields.

Consumer Sold Product record form

Field	Description
Sold Product	Products and components sold to a consumer.
Type	Related party type. **Note:** By selecting the related party type, the default responsibility mentioned in the type is added in the related party responsibility.
Consumer	Contact responsible for the sold product.
Responsibility	Access level to sold product and related information. Additional consumer with Authorized Representative responsibility requires the sn_install_base.sold_product_authorized_consumer role to get access to associated sold product and related entities. For details, see Roles installed with customer access management. **Note:** If the **Responsibility** field is empty, consumers can't access the sold product and associated case.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   Additional consumers are added to the consumer sold product.

Result

Once additional consumers are added to the sold product with a proper functional role having Authorized Representative responsibility, they can perform the following actions.

- View the list of sold products and associated install base items.
- Create cases by selecting sold products or install bases.
- View the list of cases related to the sold products or affected install bases.
- View the list of installed products.
- Access cases associated with the sold product.
- Manage service catalog requests from the sold product.

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Note:

- While creating a case for a sold product, you can only see authorized consumers on the consumer sold product.
- If you choose someone as a consumer, you can only associate the sold products they have full access to on the case.

Add additional contacts for the sold product

Add additional contacts for the B2B (accounts or contacts) or B2B2C sold product by defining the type and responsibility. Once added, additional contacts have the same access to the contact associated with the sold product and the related entities.

Before you begin

Note: Additional contacts can be enabled using the **Restrict Contact Access** field. For details, see Restrict contact access.

Role required: admin and sn_customerservice_manager

About this task

The responsibility assigned to the additional contact that is associated with a sold product gets access to the sold product and the related entities, which include installed products, install base items, and cases associated with sold products.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the desired record where you want to add additional contacts.
3. From the Additional Contacts related list, select **New**.
   Starting with the Utah release, the Additional Contacts related list has been deprecated for new customers. For upgrade customers, the Additional Contacts related list continue to be supported along with the Sold Product Related Parties related list.
4. On the form, fill in the fields.

Contact Sold Product record form

Field	Description
Sold Product	Products and components sold to an account.
Type	Related party type. **Note:** By selecting the related party type, the default responsibility mentioned in the type is added in the related party responsibility.
Contact	Contact responsible for the sold product.
Responsibility	Access level to the sold product and related information. Additional contact with Authorized Representative responsibility requires the sn_install_base.sold_product_authorized_contact role to get access to associated sold product and related entities. For details, see Roles installed with customer access management. **Note:** If the **Responsibility** field is empty, contacts won't have any access to the sold product and associated case.

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Field	Description
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   Additional contacts can be added to the B2B sold product.

   Note: Added contacts can be from the same account, partner account, or from contact relationships.

Result

Once additional contacts are added to the sold product with a proper functional role having Authorized Representative responsibility, they can perform the following actions.

- View the list of sold products and associated install base items.
- Create cases by selecting sold products or install bases.
- View the list of cases related to the sold products or affected install bases.
- View the list of installed products.
- Access cases associated with the sold product.
- Manage service catalog requests from the sold product.

Note:

- While creating a case for a sold product, you can only see authorized contacts.
- If you choose someone as a contact, you can only associate the sold products they have full access to on the case.

Add additional accounts for the sold product

Add additional accounts or contacts for your business-to-business (B2B) or business-to-business-to-consumer (B2B2C) sold products by defining the type and responsibility of additional accounts or contacts. Once you add accounts as related parties, all contacts associated with the related party account can access the sold product.

Before you begin

Role required: admin and sn_customerservice_manager

About this task

The responsibility assigned to the additional accounts that is associated with a sold product gets access to the sold product and the related entities, which include installed products, install base items, and cases associated with sold products.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select the record that you want to add the additional account to.
3. From the Sold Product Related Parties related list, select **New**.
4. On the form, fill in the fields.

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Sold Product Related Party record form

Field	Description
Sold Product	Products and components that are sold to an account.
Type	Related party type. **Note:** By selecting the related party type, the default responsibility that is mentioned in the type is added in the related party responsibility.
Account	Contacts of the account responsible for the sold product.
Responsibility	Access level to the sold product and related information. Additional account with the Authorized Account responsibility requires the sn_install_base.sold_product_authorized_contact role to get access to the associated sold product and related entities. For details, see Roles installed with customer access management. **Note:** If the **Responsibility** field is empty, the accounts don't have any access to the sold product and associated case.
Order	Specifies the sequence in which records are displayed, organized according to business preferences.

5. Select **Submit**.
   You can add additional accounts to the B2B sold product.

   Note: Added accounts can be from the same account, partner account, or from contact relationships.

Result

After additional accounts are added to the sold product with Authorized Account responsibility, the contacts of those accounts having a required functional role can perform the following actions:

- View the list of sold products and associated install base items.
- Create cases by selecting sold products or install bases.
- View the list of cases that are related to the sold products or affected install bases.
- View the list of installed products.
- Access cases that are associated with the sold product.

Note:

- While creating a case for a sold product, you can only see the authorized accounts on the account's sold product.
- If you choose an account, you can only associate a sold product that you have full access to on the case.

Add related parties to an install base item

Add related parties to an install base item in the Customer Service Management application so that you can enable another party to have access to an install base.

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Before you begin

Role required: admin and sn_customerservice_manager

About this task

An install base-related party is a list of contacts, consumers, contributors, service organization members, accounts, or service organizations. You add a related party to enable access to another party that isn't the owner of the install base. Related parties associated with an install base can access it and its related entities, including installed products, sold products, and associated cases.

Note: You can enable additional contacts by using the **Restrict Contact Access** field. For details, see Restrict contact access.

Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Open an install base item from the list.
3. Select **Install Base Related Parties**, and select **New**.
4. From the **Type** drop-down, select the type of related party that you want to add to the install base item.
   Based on the selection that you chose, you can assign one of the combinations in the following table:

Related Type list

Type	Functional Role	Entity
Authorized Account	Install Base Authorized Contact (sn_install_base.install_base_authorized_contact)	Account
Authorized Contact	Install Base Authorized Contact (sn_install_base.install_base_authorized_contact)	Contact
Authorized Consumer	Install Base Authorized Consumer (sn_install_base.install_base_authorized_consumer)	Consumer
Authorized Contributor	Install Base Authorized Contributor (sn_install_base.install_base_authorized_contributor)	User
Authorized Member	Install Base Authorized Member (sn_install_base.install_base_authorized_member)	Service Organization
Authorized Service Organization	Install Base Authorized Member (sn_install_base.install_base_authorized_member)	Service Organization
Listed Account		Not applicable
Listed Contact		Not applicable
Listed Consumer		Not applicable
Listed Contributor		Not applicable
Listed Member		Not applicable

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Type	Functional Role	Entity
Listed Service Organization		Not applicable

Note: The **Responsibility** field on the Install Base-Related Parties form is automatically populated based on the type of related party that is selected. For information on the type of related parties, see Create related party configurations.

5. To use the **Order** field to specify the sequence in which records are displayed, organized according to business preferences.
6. Select **Submit**.

Result

The contact is assigned as a related party to the Install base item. The contact gets access to all the corresponding items, such as the child install base items and the cases on the install base item form.

Restrict contact access

Restrict contact access to sold products and install bases by limiting the access for associated contacts and their access levels for customer access management.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_crm_foundation_data_manager
- sn_crm_account_relationship_data_manager
- sn_customerservice_manager
- sn_customerservice.customer_admin

About this task

By restricting contact access, you can limit access to entities that are based on the contacts that are assigned to the sold products and install bases. You can't create duplicate account access records with the same account.

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Manage Account Access**.
2. Select **New**.
3. On the form, fill in the fields.

Account Access record form

Field	Description
Account	Accounts that have restrictions for access to the sold products and install bases that are based on the associated contacts and the access level.
Restrict Contact Access	Access that is restricted to entities based on associated contacts. If the value of the field is **False**, the contacts that are associated with the account can read the sold products and install bases that are associated with the account.

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Field	Description
	If the value of the field is **True**, the contacts that are associated with the accounts don't get access to the sold products and install bases, unless they're added as a contact on the record or as a related party. The following contacts get access to the sold products and install bases: ○ Contacts that are associated with the sold product and install base records. ○ Contacts that are added as related parties with an Authorized Representative responsibility. ○ Contacts belonging to accounts that are added as related parties with an Authorized Account responsibility.

4. Select **Submit**.

Related topics

Add additional contacts for the sold product

Using Customer Contracts and Entitlements

Learn how consumers, managers, agents, and administrators use the Customer Contracts and Entitlements application to generate customer contracts and contract lines.

Customer contracts, customer contract lines, and entitlements can be created in the following ways:

- Via workflows: You can create customer contracts, customer contract lines, and entitlements by using the contracts and entitlements workflow. For more information, see Creating contracts and entitlements using workflows.

  Note: When a customer contract line or entitlement is created via the Sales Customer Relationship Management workflow, the account/consumer/household details are copied from the sold product and it inherits the state of the sold product. Further, when the state of the contract line changes, the same state is synced back to the parent sold product.

- Via API integrations:
  - Service Contract API
  - Entitlement API

Customer Contracts and Entitlements is integrated with ServiceNow® Quote Experience that provides a unified Quote Experience for creating, pricing, approving, and completing quotes. It is a single, modern quoting solution that supports both simple and complex quoting needs. It provides a configurable workspace for managing quotes, including products, pricing, approvals, and lifecycle progression. You can create and manage quotes directly from your CRM opportunity workflow. To install ServiceNow® Quote Experience, see ServiceNow Quote Experience.

You can perform the following features using Customer Contracts and Entitlements Workflows:

- Standard renewals: A standard renewal occurs when a contract is renewed on schedule. The system creates a new contract with the existing contract lines, entitlements, and child records, with the new term starting immediately after the original contract ends. There is no pricing adjustments that are needed beyond the agreed renewal terms.

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- Non-standard renewals: A non-standard renewal occurs when a contract is renewed outside of the renewal cycle. This covers three scenarios: an early renewal, a late renewal, and a short-term renewal. For more info, see Renew a customer contract line.
- Consolidation of Contracts: You can merge multiple contracts for the same account into a single contract. Use contract consolidation during renewal to align contract terms and combine subscriptions into one contract. For more info, see Renew a customer contract line.
- Upsell or Downsell: You can add or reduce the quantity to an existing contract during its term.

Using Contracts and Entitlements Workflows

Learn how contracts and entitlements using workflows enable you to create and manage customer contracts, customer contract lines, and entitlements.

You can manage the life cycle of customer contracts and entitlements from offer creation to contract generation using contracts and entitlements workflows. Using workflows you can suspend, resume, cancel, and renew multiple entities at once. You can view customer contract lines as a hierarchical list that helps to view the parent and child relationship between line items. Customer Contracts and Entitlements supports variable and derived pricing models. Contracts and entitlements correctly reflect dynamically calculated prices, ensuring consistency with underlying pricing logic and improving accuracy across contract-driven workflows. For more info, see Configuring derived pricing. You can also perform the following functions using workflows:

- Create, suspend, resume, cancel, and renew customer contracts.
- Create, modify, suspend, resume, cancel, and renew customer contract lines, and entitlements.

Automatic renewal of customer contracts

While creating customer contracts from quote or orders, you can select the **Auto-renew contract** option on a quote or order to automatically renew the contracts. When you add or delete a contract line from these customer contracts, the renewed quotes and opportunities are updated. You can configure the auto-renewal date of the contract in the Customer Life Cycle Workflows Policy decision table. By default, you can choose to initiate the auto-renewal 90, 60, or 30 days before the contract end date, or on the contract creation date. For more info, see Creating contracts and entitlements using workflows.

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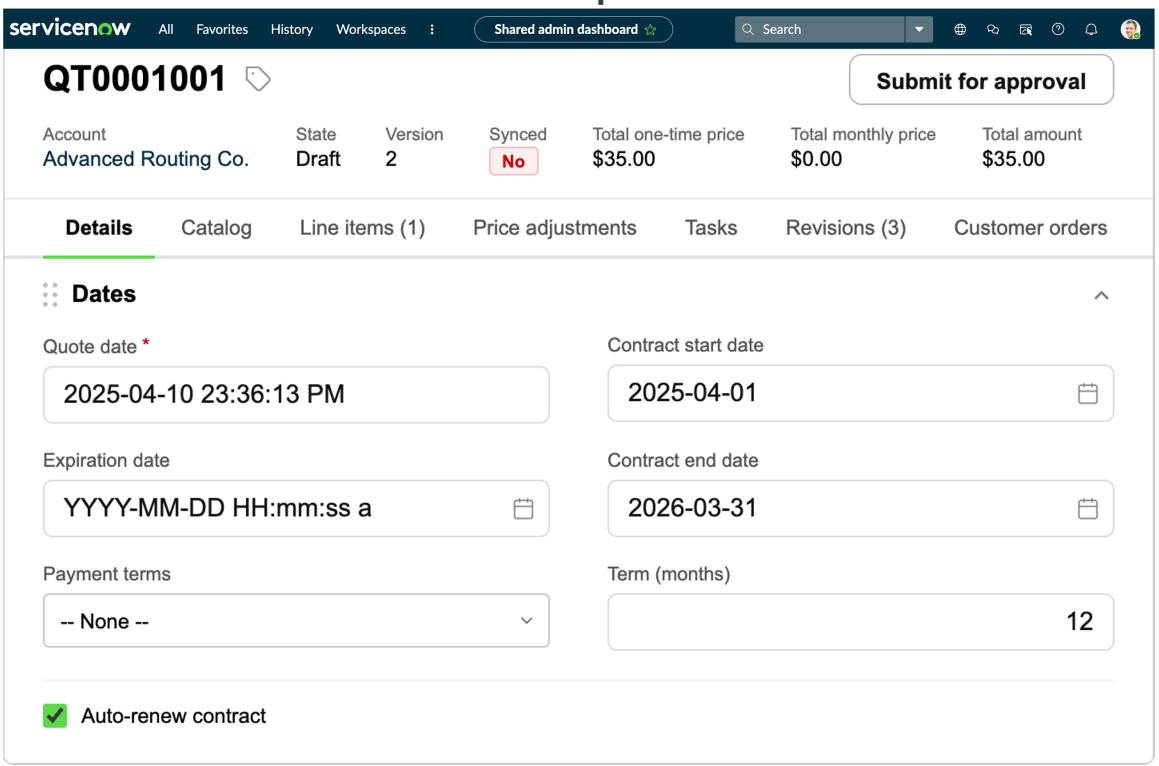
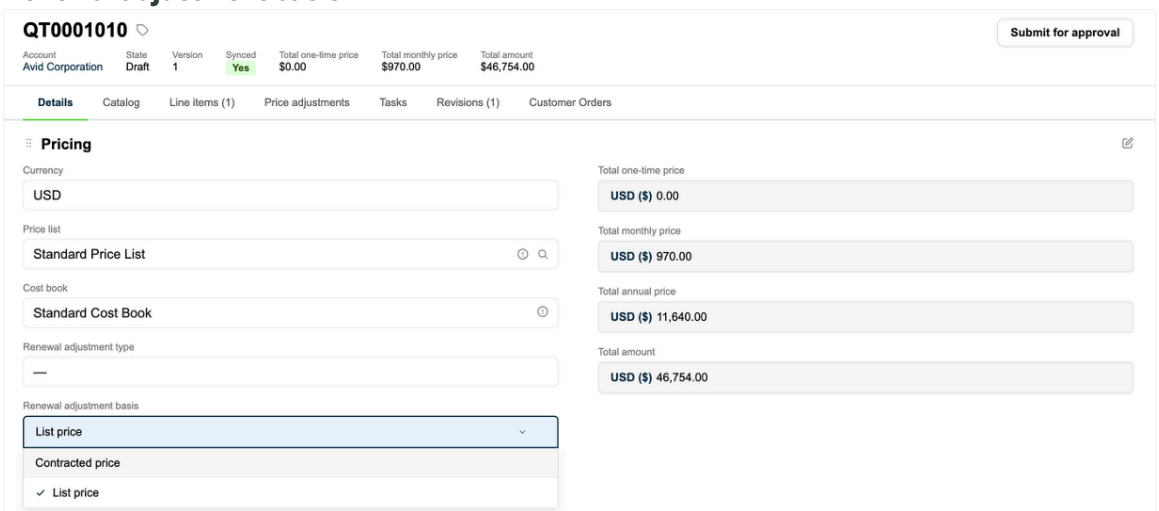
Automatic renewal for customer contracts on quotes



In the Renewal adjustment basis field, you can select **List price** or **Contracted price**. Selecting List price renews the contract at the market price of the contract at the time of the renewal date.

Renewal adjustment basis



Selecting Contracted price gives you the option to renew the contract at Markdown % or Markup % of the current contract price. For example, if you select **Markup %** field and you enter 10 in **Renewal adjustment value**, the customer contract is renewed at 10% above the current contract price.

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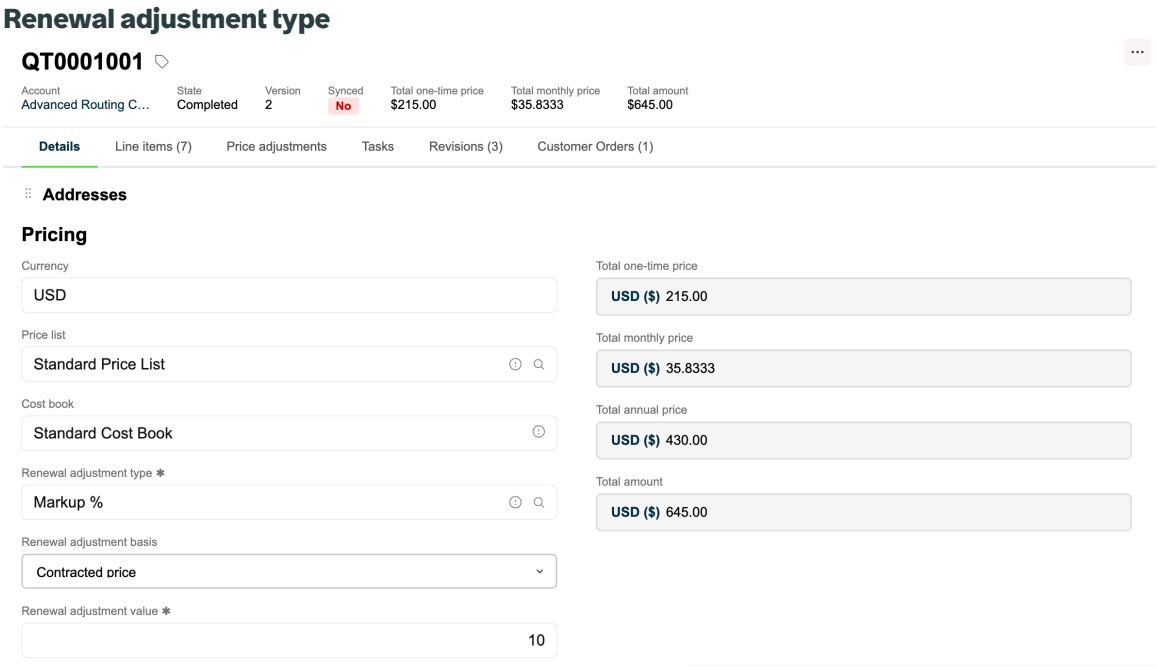
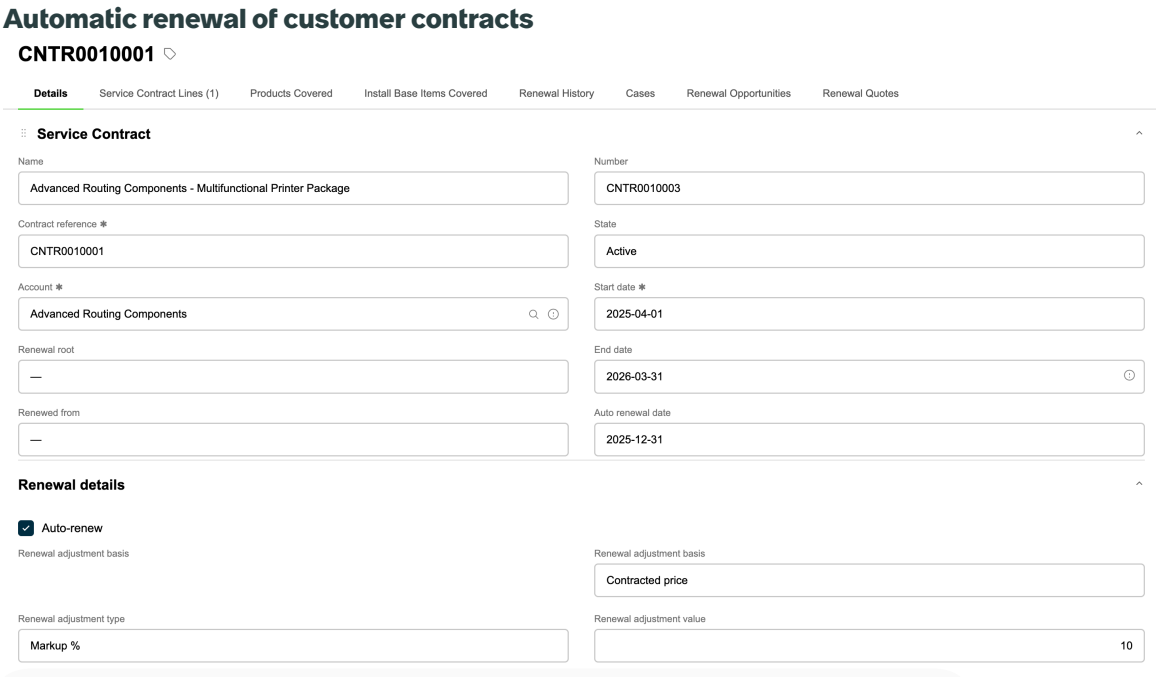


That exact renewal date and the renewal adjustments for that customer contract will be visible on the customer contract form in the **Auto renewal date** field.



You cannot modify the renewal adjustment fields on the customer contract. You can only modify the renewal adjustment values on the quote and orders.

Updating contract end date

During quote processing, the system alerts you when the contract end date is exceeding the product offering end date. When you submit quotes for approval, a dialog box appears alerting you. You can select the option **update contract end dates to match offering end dates** to match the contract end date to the product offering end date.

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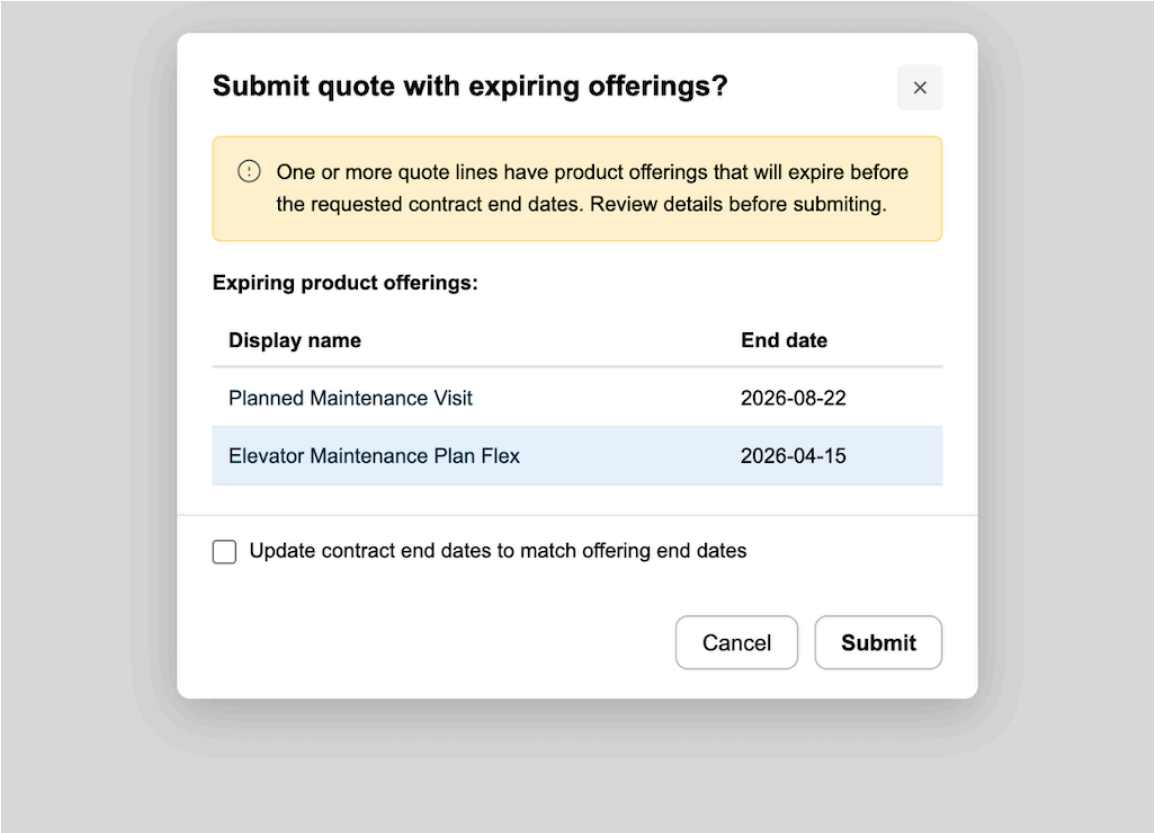
Matching the contract and product offering end dates



If you do not select this option and approve the quote, the contract end date remains the same.

Co-terminate quote lines

You can assign the same start and end dates to multiple quote lines while creating or renewing a quote. On the **Line items** tab on the quote details page, select multiple quote lines and then select **Co-terminate**. All the selected quote lines have the same start and end date.

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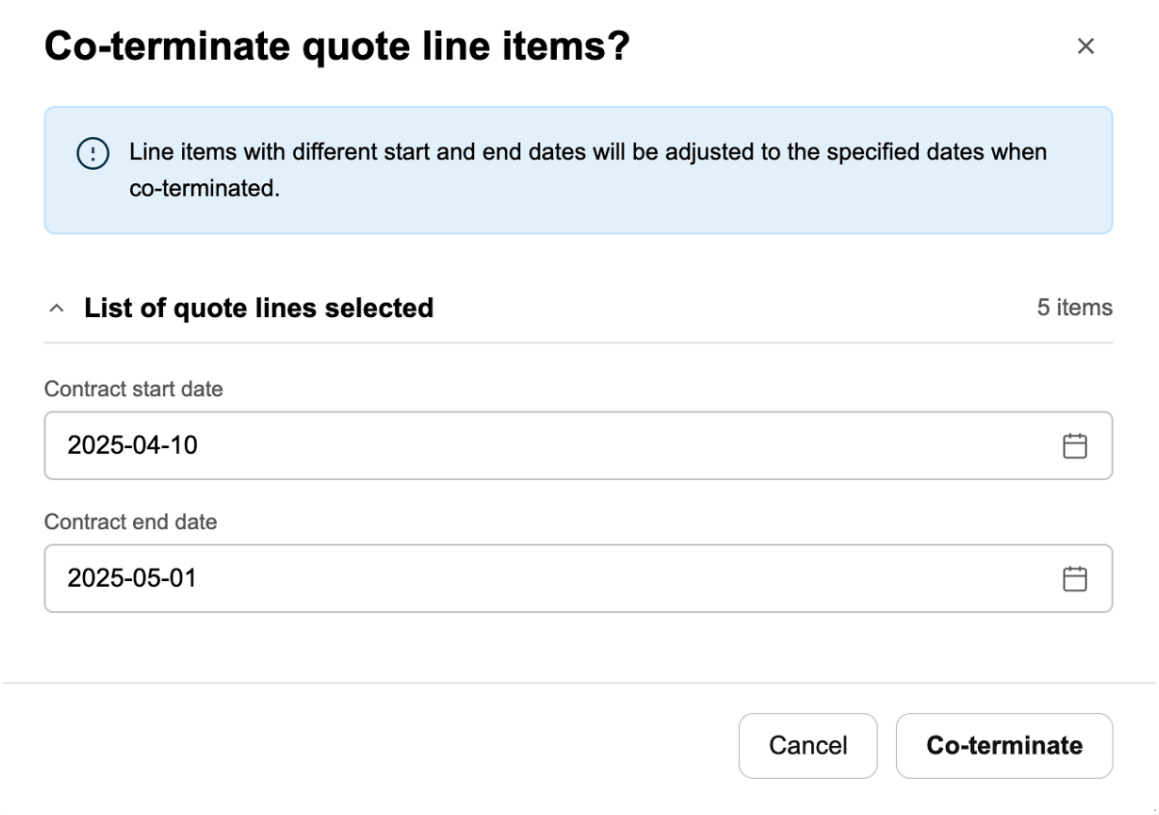
Co-terminate quote lines



Viewing price ramps

Customers can scale their purchases by adjusting the pricing and quantity throughout the contract or subscription term by using the Ramps feature. For more info, see Add price ramps on a quote line item. You can view the price ramp details on the contract line. Only the active price ramp segment is displayed on the contract line. Select a contract line and select **Ramps** to view all the details of the price ramp for that contract line. You can view start and end date, term period, ramp type (yearly or quarterly), ramp segments, and Annual percentage increase (API%). You can also process early renewal and early termination of contract lines with ramps. For more info, see, Renew a customer contract line and Modify a customer contract line.

Suspend a customer contract

Suspend a customer contract and its child customer contract lines by creating an order on the CRM Workspace. Suspending a customer contract suspends or disables the services specified in that customer contract.

Before you begin

You can suspend a customer contract when at least one of the associated root sold products is in Active state. For product inventory records, you can suspend a customer contract when the associated product inventory record is in Active state.

Note: If you don't create a resume order, the customer contract is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.

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3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Suspend**.
5. In the Suspend customer contract window, enter the period of suspension for the customer contract in the **Start date and time** and **End date and time** fields.

   Note: If you do not enter a value in the **End date and time** field, the customer contract is suspended indefinitely. You can resume the customer contract manually. For more info, see Resume a customer contract.

6. Add a reason for a suspension in the **Reason for suspension** field.
7. Select **Suspend**.
   An order with the suspend action is created for that customer contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Result

With the customer contract, all the associated customer contract lines and entitlements are also suspended. However, the customer contract stays in the current state. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the customer contract and all its associated child customer contract lines and entitlement will be in Active or Draft state again. After the end date of the customer contract, the suspended customer contract and all its associated child customer contract lines and entitlement move to Expired state.

Modify a customer contract

Modify a customer contract so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Modify all lines** to modify the customer contract.
5. On the Configurator UI, modify the existing configurations for the customer contract line.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.

   Note: The Configurator UI is displayed only if the customer contract has a single customer contract line. For multiple customer contract lines, a quote or an order will be created with contract lines in Draft or Active state.

6. Select **Update**.

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An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.

- If the selected target entity is a quote, a quote to modify the customer contract is created. You can select the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
- If the selected target entity is an order, an order to modify the customer contract is created. You can click the order number from the confirmation message to view the modified order line items.

7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Resume a customer contract

Resume a customer contract and its child customer contract lines by creating an order on the CRM Workspace. By resuming a customer contract, you are restarting the services specified in that customer contract.

Before you begin

You can resume a customer contract when at least one of the associated root sold product is in Inactive, Canceled, or Suspended state. For product inventory records, you can resume a customer contract when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Resume**.
5. In the Resume customer contract window, in the **Start date and time** field, enter when you want to resume the customer contract.
6. Add a reason for a resuming the customer contract in the **Reason for resumption** field.
7. Select **Resume**.
   An order for resuming the customer contract is created.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Result

The customer contract and all its associated child contract lines and entitlements are back in Active or Draft state, depending on the start date of the respective entity.

Renew a customer contract

Renew a customer contract on the CRM Workspace before the customer contract expires.

Before you begin

You cannot renew a customer contract when it is in Canceled state or it does not have an end date.
The order processing for product inventory based contracts are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

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Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the customer contract is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the customer contract is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the customer contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.
5. After the order line items are fulfilled, set the status to **Completed**.
   A new customer contract is created.

Result

A new customer contract is created in the Draft state. You can view more details in the Renewal History related list.

Cancel a customer contract

Create an order to cancel a customer contract and its child customer contract lines on the CRM Workspace. By canceling a customer contract, you are terminating the services specified in that customer contract.

Before you begin

You can cancel a customer contract when at least one of the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a customer contract when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *`CRM Workspace`*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select **Cancel**.

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All the associated customer contract lines and entitlements will also be cancelled and will be set to the Cancelled state.

5. In the Cancel customer contract window, in the **Start date and time** field, enter the date when the customer contract will be cancelled.
6. Add a reason for a cancellation in the **Reason for cancellation** field.
7. Select **Cancel**.
   An order with the cancel action is created for that customer contract.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract.

Result

With the customer contract, all the associated customer contract lines and entitlements are also cancelled and will be in **Cancelled** state.

Suspend a customer contract line

Suspend a customer contract line and its child customer contract lines by creating an order on the CRM Workspace. By suspending a customer contract line, you are suspending or disabling the services and characteristics associated with that customer contract line.

About this task

Before you begin

You can suspend a customer contract line when the associated root sold product is in Active state. For product inventory records, you can suspend a customer contract line when the associated product inventory record is in Active state.

Note: If you don't create a resume order, the customer contract line is indefinitely suspended.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. Select the customer contract line from the customer contract lines related list, that you want to suspend.
5. Select **Suspend**.
6. In the Suspend customer contract line window, enter the period of suspension for the customer contract line in the **Start date and time** and the **End date and time** field.

   Note: If you do not enter a value in the **End date and time**, the customer contract line will be suspended. You can manually resume the customer contract by using the resume option. For more info, see Resume a customer contract line

7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that customer contract line.

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9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Result

With the customer contract line, all the associated entities in the hierarchy are also suspended. If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the customer contract line will be in Active state again. After the end date of the customer contract, the suspended customer contract line and all its associated child customer contract lines and entitlement move to Expired state.

Modify a customer contract line

Modify a customer contract line so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract lines related list, select one or more customer contract lines that you want to modify.
5. From the **Modify** list, select one of the options to perform one of these actions:
   - If you select **Modify entire line**, the Configurator UI is displayed. Modify the existing configurations for the customer contract line.

     Note: The Configurator UI is displayed only if you select a single customer contract line. If you selected multiple customer contract lines, the order or quote created is displayed.

   - If you select **Modify quantity**, you can reduce or increase the quantities of the products specified in the selected contract lines. For more info, see Upsell or Downsell a customer contract line.

     Note: You cannot modify quantity on a ramped contract line.

   - If you select **Modify end date**, you can select an earlier end date or a later end date than the current end date to perform an early termination or extension of a contract line. For a ramped contract line, you can only select a date before the contract expiry date in the **End date** field to perform an early termination. The contract line splits into two contract lines. One contract line has the new end date that you selected and the second contract line has the original end date with State as **Canceled** and Quantity as **Zero**. The remaining segments are canceled and their quantities are zero.
6. Select **Update**.
   An order or a quote is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.

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- If the selected target entity is a quote, a quote to modify the customer contract line is created. You can select the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
- If the selected target entity is an order, an order to modify the customer contract line is created. You can select the order number from the confirmation message to view the modified order line items.

7. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Resume a customer contract line

Create an order to resume a customer contract line and its child customer contract lines on the CRM Workspace. By resuming a customer contract line, you are restarting the services specified in that customer contract line.

Before you begin

You can resume a customer contract line when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume a customer contract line when the associated product inventory record is in Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract lines related list, select the customer contract line that you want to resume.
5. Select **Resume**.
6. In the Resume customer contract line window, in the **Start date and time** field, enter when you want to resume the customer contract line.
7. Add a reason for a resuming the customer contract line in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the customer contract line is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Result

With the customer contract line, all the associated entities in the hierarchy are also back in Active or Draft state, depending on the start date of the respective entity.

Renew a customer contract line

Renew a customer contract line on the CRM Workspace. You can renew the services specified in the customer contract line and its associated child customer contract lines and entitlements.

About this task

You cannot renew a customer contract line when it is in Canceled state or it does not have an end date.

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The order processing for product inventory based contract lines are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.
3. In the customer contract lists, select the customer contract that you want to renew.
4. In the customer contract lines related list, select the customer contract lines that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the customer contract line is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the customer contract line is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the customer contract is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

     Note: If you select a quote or an opportunity, the line items with same product offerings and configuration will be consolidated into a single quote or opportunity line. The consolidated line item reflects the total quantity of all the combined items. For more info, see Consolidate quotes.

   If more than 20 contract lines are renewed, the target entities are created asynchronously. You can configure the threshold value for the number of contract lines.
6. Perform an early or late renewal on the customer contract line.
   For an early renewal, you can terminate the contract before the expiry date and create a new contract with the new start date. For a late renewal, you can renew expired contracts that are not renewed.
   - Select a date before the contract expiry date in the **Renew from** field to perform an early renewal. Two quote or order line items are created. One change order or quote line is created with the modified expiry date of the current service contract line. A new renewal quote or order line is created with the new start date.
   - For an expired contract line, enter a new date to renew the service contract line in the **Start from** field. A new renewal quote or order line is created with a new start date.

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- For a ramped contract line, select a date before the contract expiry date in the **Renew from** field to perform an early renewal. The contract line splits into two contract lines. One contract line has the early renewal end date that you selected and the second contract line has the original end date with State as **Canceled** and Quantity as **Zero**. The remaining segments are canceled and their quantities are zero.

  Note: If a customer contract line is terminated before its end date, the status of that contract line is updated to **Canceled** after its end date. That early terminated customer contract line is excluded from the renewal workflow and any renewal quote for that contract line is deleted.

7. After the order line items are fulfilled, set the status to **Completed**.
   A new customer contract line is created.

Result

The new customer contract line is created with the renewed contract line in the Draft state. You can see more details in the Renewal History related list.

Cancel a customer contract line

Create an order to cancel a customer contract line and its child customer contract lines on the CRM Workspace. By canceling a customer contract line, you are canceling or disabling the services and characteristics associated with that customer contract line.

Before you begin

You can cancel a customer contract line when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel a customer contract line when the associated product inventory record is in Active or Suspended state.
Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract.
4. In the customer contract, select the customer contract line from the customer contract lines related list, that you want to cancel.
5. Select **Cancel**.
6. In the Cancel customer contract line window, in the **Start date and time** field, enter the date when the customer contract line will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.
   An order with the cancel action is created for that customer contract line.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the customer contract line.

Result

With the customer contract line, all the associated entities in the hierarchy are also cancelled and move to Cancelled state.

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Upsell or Downsell a customer contract line

Upsell or downsell a customer contract line on the CRM Workspace. You can reduce or increase the quantities of the products specified in the customer contract line.

Before you begin

Role required:

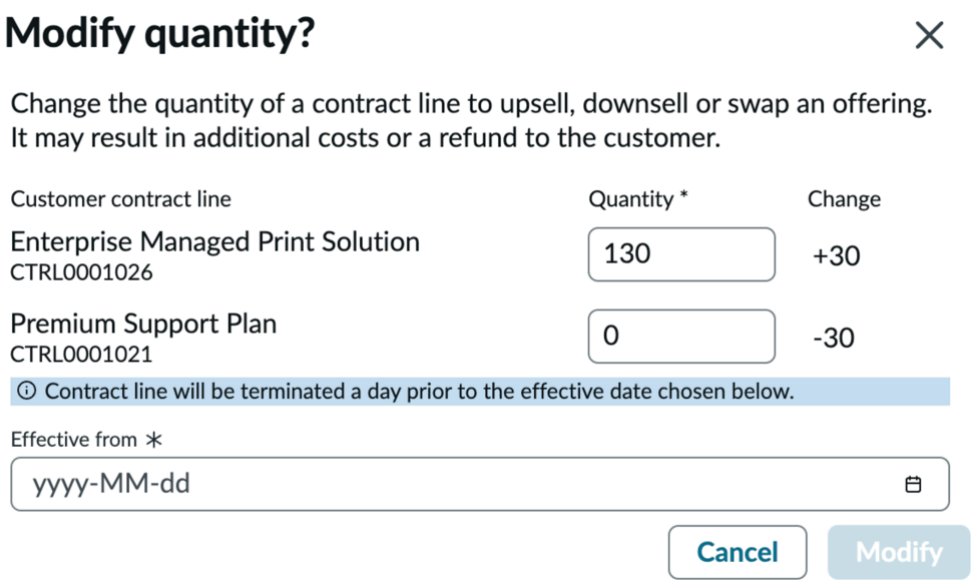
- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

About this task

https://player.vimeo.com/video/1185322362?h=80bb86b2dd&badge=0&autopause=0&player_id=0&app_id=58479

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**.
3. In the customer contract lists, select the customer contract that you want to update.
4. In the customer contract lines related list, select one or more customer contract lines that you want to modify.
5. From the **Modify entire line** list, select **Modify quantity**.
6. In the Modify quantity dialog box, you can swap the values fully or partially in the **Quantity** field for both the contract lines.



For example, if one product has a quantity of 100 and another has 30, you can perform either a full swap or a partial swap. In the screenshot above, a full swap is completed by updating the Quantity field of the first contract line to **130** (adding the 30 units from the second line) and setting the second contract line's quantity to 0. The Change field reflects the change in quantity.

You can also perform a partial swap. For instance, you can update the second contract line from 30 to 20, and add the remaining 10 units to the first contract line, increasing it from 100 to 110.

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7. Select the start date of the new customer contract line from the **Effective from** field.
8. Select **Modify**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - In case of a partial swap, three quote lines are created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order with three order line items.
   - In case of a full swap, two quote lines are created. You can select the quote number from the confirmation message to view the quote line items. The quote is approved and the status changes to **Complete** to create an order with two order line items.
9. In the Line Items related list, select the State value of the parent order lines and set them to **Completed**.
   In case of partial swap, two new customer contract lines with the modified quantities are created with the Start date as the **Effective from** date. The end date of the existing contract line is updated. In case of full swap, one new customer contract line with the modified quantity is created with the Start date as the **Effective from** date. The end date of the existing contract line is updated.

   Note: You can perform a partial or a full swap with a new product from the catalog by following the same procedure.

Modify an entitlement

Modify an entitlement associated to an account so that you can update its existing configurations.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to modify the characteristics for.
5. Select **Modify**.

   Note: You can only modify entitlements associated with an account. You cannot modify entitlements associated to customer contract lines.

6. On the Configurator UI, modify the existing configurations for the selected entitlement.
   To learn more about the Configurator UI, see Exploring Sales Customer Relationship Management.
7. Select **Update**.

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An order or a quote will be created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.

- If the selected target entity is a quote, a quote to modify the entitlement is created. You can click the quote number from the confirmation message to view the modified quote line items. The quote is approved and the status changes to **Complete** to create an order.
- If the selected target entity is an order, an order to modify the entitlement is created. You can click the order number from the confirmation message to view the modified order line items.

8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Suspend an entitlement

Suspend an entitlement by creating an order on the CRM Workspace. By suspending an entitlement, you are suspending or disabling the services and characteristics associated with that entitlement.

Before you begin

You can suspend an entitlement when the associated root sold product is in Active state. For product inventory records, you can suspend an entitlement when the associated product inventory record is in Active state.

Note: You can only suspend entitlements associated with an account. You cannot suspend entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to suspend.
5. Select **Suspend**.
6. In the Suspend entitlement window, enter the period of suspension for the entitlement in the **Start date and time** and the **End date and time** field.

   Note: If you do not enter a value in the **End date and time**, the entitlement will be suspended You can resume the entitlement manually by using the resume option. For more info, see Resume an entitlement.

7. Add a reason for a suspension in the **Reason for suspension** field.
8. Select **Suspend**.
   An order with the suspend action is created for that entitlement.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result

If you specify an end date and time, a resume order line item is created as a part of the same order. After this period of suspension, the entitlement will be in Active state again. After the end date of the entitlement, the suspended entitlement will move to Expired state.

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Resume an entitlement

Resume an entitlement by creating an order on the CRM Workspace. By resuming an entitlement, you are restarting the services and the characteristics specified in that entitlement.

Before you begin

You can resume an entitlement when the associated root sold product is in Inactive, Cancelled, or Suspended state. For product inventory records, you can resume an entitlement when the associated product inventory record is in Suspended state.

Note: You can only resume entitlements associated with an account. You cannot resume entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to resume.
5. Select **Resume**.
6. In the Resume entitlement window, in the **Start date and time** field, enter when you want to resume the entitlement.
7. Add a reason for a resuming the entitlement in the **Reason for resumption** field.
8. Select **Resume**.
   An order for resuming the entitlement is created.
9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result

The entitlement is back in Active or Draft state, based on the start date of the entitlement.

Renew an entitlement

Renew an entitlement on the CRM Workspace.

Before you begin

You cannot renew an entitlement when it is in Canceled state or it does not have an end date. For more info, see Order fulfillment.

The order processing for product inventory based entitlements are executed according to the fulfillment flow defined by the customer for these offerings being renewed.

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote or opportunity, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.

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3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to renew.
5. Select **Renew**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to renew the entitlement is created. You can select the quote number from the confirmation message to review the renewal quote. After the quote is approved and the status is updated to **Complete**, an order is created for further processing.
   - If the selected target entity is an order, an order to renew the entitlement is created. You can select the order number from the confirmation message to review the renewal order.
   - If the selected target entity is an opportunity, an opportunity to renew the entitlement is created. You can select the opportunity number from the confirmation message to review the renewal opportunity.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to renew the entitlement are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.
6. After the order line items are fulfilled, set the status to **Completed**.
   A new entitlement is created.

Result

The new entitlement is created in the Draft state. You can see more details in the Renewal History related list.

Cancel an entitlement

Cancel an entitlement by creating an order on the CRM Workspace. By canceling an entitlement, you are canceling or disabling the services and characteristics associated with that entitlement.

Before you begin

You can cancel an entitlement when the associated root sold product is in Active or Suspended state. For product inventory records, you can cancel an entitlement when the associated product inventory record is in Active or Suspended state.

Note: You can only cancel entitlements associated with an account. You cannot cancel entitlements associated to customer contract lines.

Role required: sn_customerservice_manager and sn_ind_tmt_orm.order_agent

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the list view, select **Customer** > **Accounts**.
3. Open the account that the entitlement belongs to.
4. In the entitlements related list, select the entitlement that you want to cancel.
5. Select **Cancel**.
6. In the Cancel entitlement window, in the **Start date and time** field, enter the date when the entitlement will be disabled.
7. Add a reason for a cancellation in the **Reason for cancellation** field.
8. Select **Cancel**.

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An order with the cancel action is created for that entitlement.

9. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   The modifications are visible on the entitlement.

Result

The entitlement is permanently cancelled and will move to Cancelled state.

Add contract lines to a customer contract

Add one or more contract lines to a customer contract on the CRM Workspace.

Before you begin

Role required:

- To create an order, you need sn_customerservice_manager and sn_ind_tmt_orm.order_agent.
- To create a quote, you need sn_customerservice_manager and sn_sales_common.sales_agent.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. In the Contracts and Entitlements list, select **Customer Contracts**.
3. In the Contracts and Entitlements - Customer Contracts list, select the customer contract to add more contract lines.
4. On the Customer Contract form, select **Customer Contract Lines** related list.
5. Select **New**.
   The target entity is created depending on the rules set in the Customer Life Cycle Workflows Policy decision table. For more info, see Configuring Customer Life Cycle Workflows Policy decision table.
   - If the selected target entity is a quote, a quote to create new customer contract line is created.
   - If the selected target entity is an order, an order to create new customer contract line is created.
   - If the selected target entity is an opportunity, an opportunity to create a new customer contract line is created.
   - If the selected target entity is an opportunity and a quote, both opportunity and quote to create the customer contract are created. You can navigate to the opportunity and quote by selecting the numbers from the confirmation message.

   The Existing contract field will refer the current customer contract. All the other fields like Contract start date, Contract end date, and contract renewal fields will be auto-populated with the current contract details.
6. In the Catalog tab, add products to the new quote or order that is created.
   For more info, see Add products to a quote.
7. Select **Submit for approval**.
8. In the Order Line Items related list, double-click the State value of the parent order line and set it to **Completed**.
   On the Customer Contract Line related list, a new customer contract line is created and added.

Result

The new customer contract line is added to the contract and is visible on the selected target entity. The new customer contract line is synced with auto-renewal quote or opportunity that is

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generated for the contract. When the associated customer contract is auto renewed, the new customer contract line is automatically renewed and added to the renewal quote or opportunity.

Add Covered Products using Contracts and Entitlement Workflow

Covered products refers to specific products or order line items that are included in a customer contract. These items are linked to the contract to define what is covered for service or maintenance. Covered products can be directly tracked through the contract records, facilitating changes and visibility of what is covered.

Agents in Order management can select the products to be covered by a contract when the order is captured for the contract offering. To manually associate a covered product with a contract line, see the Add covered products to order line items

You can also modify the covered products added to a contract line. You can add new covered products to that contract line or entitlement and remove the existing covered products.

Add a sold product or install base item to a customer contract

Add the sold products or the install base items covered to customer contracts, contract lines, or entitlements.

Before you begin

Role required: sn_customerservice_manager

About this task

Sold products are products and components that have been sold to an account or a consumer and can have multiple contracts. An install base item is an instance of sold product that has been provisioned for an account or consumer.

Associating sold products or install base items to a Customer Contracts and Entitlements entity helps keep a track of the products or install base items that are serviced to a customer under that entity.

A sold product or an install base item can be added to a Customer Contracts and Entitlements entity in the Draft, Active, or Suspended states.

Note: If an entity is deleted, the related sold product or install base item covered is also deleted.

Procedure

1. Navigate to the ServiceNow AI Platform interface or the CRM Workspace.

Interface	Action
ServiceNow AI Platform interface	Navigate to **All** > **Customer Service** > **Contracts and Entitlements**.
CRM Workspace	○ Navigate to **All** > **Workspace Experience** > **Workspaces** > *CRM Workspace*. ○ In the list view, navigate to **Contracts and Entitlements**.

2. Add the sold product or install base item covered to customer contracts, contract lines, or entitlements.

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Add to	Procedure
Customer Contracts	**a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**. **Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. **b.** Select the customer contract that you want to add the sold product or install base item to. **c.** From the Products Covered or Install Base Items Covered related list, select **New**.
Customer Contract Lines	**a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**. **Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. **b.** Select the customer contract that has the required contract line. **c.** From the Customer Contract Lines related list, select the contract line that you want to add the sold product or install base item covered to. **d.** From the Sold Product Covered or Install Base Items Covered related list, select **New**. **Note:** When a sold product or an in stall base item covered is added to a contract line, it is not added to the relat ed entitlements.
Entitlements	**a.** In the list view, navigate to **Contracts and Entitlements** > **Customer Contracts**. **Note:** In the ServiceNow AI Platform interface, select **Customer Contracts** in the navigation menu. **b.** Select the customer contract that has the required contract line. **c.** From the Customer Contract Lines related list, select the contract line that has the re quired entitlement.

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Add to	Procedure
	d. From the Entitlements related list, select the entitlement that you want to add the sold product or install base item to. **e.** From the Sold Product Covered or Install Base Items Covered related list, select **New**. You can also directly navigate to Entitlements form as follows: **a.** In the list view, navigate to **Contracts and Entitlements** > **Entitlements**. **Note:** In the ServiceNow AI Platform interface, select **Entitlements** in the navigation menu. **b.** Select the entitlement that the sold product or install base item must be added to. **c.** From the Sold Product Covered or Install Base Items Covered related list, select **New**.

Note:

- You can either add a sold product or an install base item to the Customer Contracts and Entitlements entity.
- The state of the entity shouldn't be Expired or Canceled.

3. On the Sold Product Covered form, fill in the fields.
   For a description of the field values, see Sold product form.
4. Select **Submit**.

Record the usage on the entitlement

Record the consumption or usages made out of the total characteristic quantities allotted for an entitlement.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

When an entitlement moves to the Active state, usage records are created. You can update the usage records on the basis of units or quantities used as and when the customer uses the services. For example, if a characteristic includes 50 visits to the customer, then the Total units field displays 50 and the Used units field is updated after each visit. Managers can create and update usage records for an entitlement but agents can only update the Used units field.

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Procedure

1. Navigate to the ServiceNow AI Platform interface or the CRM Workspace.

Interface	Action
Platform interface	Navigate to **All** > **Customer Service** > **Con tracts and Entitlements** > **Customer Con tracts**.
CRM Workspace	○ Navigate to **All** > **Workspace Experience** > **Workspaces** > *CRM Workspace*. ○ In the list view, navigate to **Contracts and Entitlements** > **Entitlements**.

2. Record the usage on an entitlement.

From	Do this
Customer Contracts	**a.** Select the contract that has the entitlement that you want to track the usage on. **b.** From the Customer Contract Lines related list, select the contract line that has the enti tlement. **c.** From the Entitlements related list, select the entitlement. **d.** From the Entitlement Usages related list, open the usage record.
Entitlements	**a.** Select the entitlement that you want to track the usage on. **b.** From the Entitlement Usages related list, open the usage record.

3. On the Entitlement Usage form, fill in the **Used units** field.
4. Select **Update**.
5. On the Entitlement page, select **Update** to save the entitlement.
   If you have used the Customer Contracts menu to record the usage, then select **Update** to save the contract line and then the customer contract.

Create a social media profile

Users with the customer service manager role can create a social media profile for an account, contact, or consumer.

Before you begin

Role required: sn_customerservice_manager or admin

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Procedure

1. Navigate to an Account, Contact, or Consumer record.
   - **Customer Service** > **Customer** > **Accounts**
   - **Customer Service** > **Customer** > **Contacts**
   - **Customer Service** > **Customer** > **Consumers**
2. In the **Social Profiles** related list on the selected record, click **New**.
3. Fill in the fields on the Social Profile form, as appropriate.

Social Profile form fields and definitions

Field	Definition
Channel	The social media channel for this profile. For example, Twitter or Facebook. **Note:** This field is a reference to the Social Channels [sn_app_cs_social_social_channel] table.
Social ID	The user's name or handle for the selected social media channel.
Contact	If created from the Contact form, this field displays the name of the contact.
Consumer	If created from the Consumer form, this field displays the name of the consumer.
Account	If created from the Account form, this field displays the name of the account.
Profile URL	The link to the user's social media account.

4. Click **Submit**.

Related topics

Social media integration

Create a social media log entry

Users with the customer service manager role can create a social media log entry for a case.

Before you begin

Role required: sn_customerservice_manager or admin

About this task

If necessary, a customer service manager or administrator can create an entry on the **Social Logs** related list. The entries on this list are typically populated by the social integration tool.

Procedure

1. Navigate to the desired Case form.
2. From the **Social Logs** related list, click **New**.
3. Fill in the fields on the Social Log form, as appropriate.

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Social Log form fields and definitions

Field	Definition
Social Profile	The social profile for the customer contact or consumer.
Agent	The agent participating in the conversation.
Social URL	The URL for the social conversation. Clicking this URL opens the conversation in a new tab.
Document	The related case number.
Message	The details of the conversation.

4. Click **Submit**.

Using customer data models for B2B2C

With the business-to-business-to-consumer (B2B2C) model, organizations across industries can easily configure multi-level customer relationships and support business customers who can support their end consumers.

Understanding the B2B2C model

The B2B2C model involves interactions where a business sells products or services to another business, which then provides these products or services to the end consumer. The functionality supports multi-layered relationships by capturing and organizing relevant data across both business entities and end consumers.

Benefits

- Improved Data Accuracy: By structuring data methodically, it confirms that information is accurate and up-to-date, reducing errors and enhancing decision-making capabilities.
- Enhanced Customer Insights: The data models provide a holistic view of both business customers and end consumers, enabling a better understanding of customer needs and preferences.
- Operational Efficiency: Streamlined data management processes lead to faster service delivery and issue resolution, improving overall operational efficiency.
- Scalability: As businesses grow, the data models can be scaled to accommodate more customers and complex relationships without compromising on data integrity.
- Personalized Service: With detailed customer data, businesses can offer tailored services and solutions, leading to higher customer satisfaction and loyalty.

Associating entities with account consumers

Topic	Description
Associate an account with consumers	Enable customer service managers to identify the end consumers who are using products or services and track customer information.

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Associating entities with account consumers (continued)

Topic	Description
Associate sold products with account consumers	Enable customer service managers to track sold products or services by associating sold products or services with account consumers.
Associate install base items with account consumers	Enable customer service managers to track the instances provisioned by associating install base items with account consumers.
View install base information as an account consumer	Track the instances provisioned for your account and which products or services run on them by viewing a list of install base items.
View sold products information as an account consumer	Track the products or services sold to your account by viewing the list of sold products from the Customer Service Portal.

Associate an account with consumers

Enable customer service managers to identify the end consumers who are using products or services and track customer information.

Before you begin

Role required: One of the following roles:

- sn_crm_foundation_admin
- sn_customerservice_manager
- sn_crm_foundation_data_manager

Procedure

1. Navigate to **All** > **Customer Service** > **Accounts**.
2. Select an account.
3. Select the **Consumers** related list.
4. Select **New** to add an existing or new consumer.

Options and procedure

Option	Procedure
Add an existing consumer	**a.** In the **Consumer** field, select the Lookup using list icon (🔍). **b.** Select a consumer from the list.
Add a new consumer	**a.** In the **Consumer** field, select the Lookup using list icon (🔍). **b.** Select **New**.

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Option	Procedure
	c. On the Consumer form, fill in the fields. **d.** Select **Submit**.

5. Select **Submit**.

Result
The selected consumer is associated with the account.

Associate sold products with account consumers

Enable customer service managers to track sold products or services by associating sold products or services with account consumers.

Before you begin
Role required: sn_customerservice_manager

Procedure
1. Navigate to **All** > **Customer Service** > **Products** > **Sold Products**.
2. Select a product that doesn't have a consumer associated with it yet.
3. Either add an existing consumer or a new one.

Options and procedure

Option	Procedure
Add an existing consumer	**a.** In the **Consumer** field, select the Lookup using list icon ( ). **b.** Select a consumer from the list.
Add a consumer	**a.** In the **Consumer** field, select the Lookup using list icon ( ). **b.** Select **New**. **c.** On the Consumer form, fill in the fields. **d.** Select **Submit**.

4. Select **Update**.

Result
The product is associated with the consumer.

Associate install base items with account consumers

Enable customer service managers to track the instances provisioned by associating install base items with account consumers.

Before you begin
Role required: sn_customerservice_manager

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Procedure

1. Navigate to **All** > **Customer Service** > **Products** > **Install Base Items**.
2. Select an item that doesn't have a consumer associated with it yet.
3. Either add an existing consumer or a new one.

Actions and procedure

Action	Procedure
Add an existing consumer	**a.** In the **Consumer** field, select the Lookup using list icon ( ). **b.** Select a consumer from the list.
Add a consumer	**a.** In the **Consumer** field, select the Lookup using list icon ( ). **b.** Select **New**. **c.** On the Consumer form, fill in the fields. **d.** Select **Submit**.

4. Select **Update** to save your changes.

View install base information as an account consumer

Track the instances provisioned for your account and which products or services run on them by viewing a list of install base items.

Before you begin

Role required: sn_acct_consumer.consumer

About this task

View the list of install base items information from the Customer Service Portal.

Note: The **Entitlements** widget and the **Contracts** widget aren't visible for account consumers.

Procedure

1. Navigate to the Customer Service Portal.
2. Select **Support** > **Install Base**.
   The system displays a list of install base items that belong to your account.
3. Select an install base to view its details.

   Note: The default view is the form view. If you switch to the list view, the **Account** and **Consumer** fields aren't displayed. See Configure the Install Base items and Sold Products lists for details.

View sold products information as an account consumer

Track the products or services sold to your account by viewing the list of sold products from the Customer Service Portal.

Before you begin

Role required: sn_acct_consumer.consumer

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About this task

View a list of sold products to track the products or services sold to your account.

Note: The **Entitlements** widget and the **Contracts** widget aren't visible for account consumers.

Procedure

1. Navigate to the Customer Service Portal.
2. Select **Support** > **Products**.
   The system displays a list of products that belong to your account.
3. Select a product to view its details.

Note: The default view is the form view. If you switch to the list view, the **Account** and **Consumer** fields aren't displayed. See Configure the Install Base items and Sold Products lists for details.

Using CSM Data Classification

The CRM Data Classification (sn_csm_dataprivacy) store application provides base system classifications for customer relationship management (CRM) data. It categorizes data as internal, personally identifiable information (PII), confidential, and more. The solution leverages the ServiceNow AI Platform data privacy capabilities to apply appropriate protection measures and enhance data security.

Data Classification

As your organization imports and generates significant amounts of sensitive data, including PIIs, it's essential to conform with various privacy laws and security regulations for data protection. With CRM Data Classification, you can identify, categorize, and secure sensitive CRM data.

As an administrator, you can classify sensitive data based on predefined criteria that reflect the sensitivity levels of different data types within your instance. The CRM Data Classification application includes out of the baseline templates for several key plugins. For more details on creating custom templates, see Data classification.

Data Protection

Once data is classified, you can apply appropriate security controls and policies based on classification levels. These templates help administrators review classifications and apply appropriate data protection measures. These data protection measures might include techniques such as anonymization, encryption, or implementing a zero trust architecture.

The solution leverages Data Classification capabilities to automate data handling policies at the ServiceNow AI Platform level through ServiceNow Vault. For detailed guidance on applying data protection measures, see ServiceNow Vault.

Customer communication

Prioritize clear, timely, and meaningful customer interactions to ensure satisfaction and loyalty. Leverage comprehensive suite of tools to facilitate robust customer communication and enhance service management practices.

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Different ways of customer communication

Using Playbooks for Portals	Whether you're a customer service agent or a customer, you can use Customer Service Management (CSM) playbooks on service portals to complete the tasks and activities that you need to resolve your cases.
Using Walk-up Experience	Use the Walk-up Experience feature to check-in at a walk-up location, book appointments from the customer service portal, and monitor queues.
Using Auto-Responder for case deflections	Deflect cases by automatically sending relevant content through the Auto-Responder feature after a customer contact or consumer creates a case.
Using Omnichannel Callback for Customer Service Management	The ServiceNow Omnichannel Callback for Customer Service Management app enables a callback option for customers when there's a long wait time for a live agent.
Using the Customer Service Portal	Search for information about a question or an issue, or request assistance from a customer service agent.
Using the Consumer Service Portal	The Consumer Service Portal is a web interface that your company can use to provide information and support to consumers.
Using Conversational Appointment Booking	Customers can initiate an appointment booking conversation in a chat on your support portal using a Virtual Agent, and Agents can use Autopilot to display Virtual Agent topics during conversations.
Using the Business Location Service Portal	Use the Business Location Service Portal (BLSP) available with the Customer Service Management (CSM) application as a one-stop shop to manage the internal and external organizations.

Using Playbooks for Portals

Whether you're a customer service agent or a customer, you can use Customer Service Management (CSM) playbooks on service portals to complete the tasks and activities that you need to resolve your cases.

With Playbooks for Portals, you get a guided interface where you can take prompt actions on the pending tasks and activities that are related to your cases. You get the following key benefits by using Playbooks for Portals:

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- Enhanced experience. Follow the step-by-step process that has features, such as save and resume, where you can initiate work on a case and then resume it later.
- Decreased case resolution time. Track and complete the requested tasks promptly and accurately. You can get a faster case resolution with Playbooks for Portals.
- Increased visibility. Get visibility into the status of the case and get insights into the expected resolution time.

The playbook includes multiple stages. Each stage has one or more activities to complete. You can see the activity stream against the case playbook, the task on the playbook, and the related information for the case as available. When using a playbook, you can do the following actions:

- View the stages and activities outlined in the playbook.
- Select an activity and carry out the required tasks to complete it.
- See the status indicators that display the current state of each activity or step.
- See the check boxes and counters that indicate where you are in the workflow.
- Mark an activity as complete and proceed to the next activity or stage.
- Continue completing the stages and activities necessary to submit the case.

Related topics

Creating an onboarding case with Playbooks for Portals

Creating a guided onboarding case from CRM Workspace

Create an onboarding request from the service catalog

Creating an onboarding case with Playbooks for Portals

Whether you're a contact or a consumer, you can create an onboarding case with a case type that is based on the issue or request in either the Customer Service Portal or Consumer Service Portal.

Playbooks for Portals overview

With Playbooks for Portals, you get a clear roadmap where you can see your progress in the submission process and in the remaining steps that you have left to complete. If needed, you can easily navigate back to a previous step. To expedite the process, you're presented with the options and input controls so that you can quickly and accurately input your information. Additionally, you can save an application or form that is not yet ready for submission so that you can resume work on it later. After saving the case, you can access the playbook through the case lists and find your saved drafts in the case list view on the **My Draft Cases** tab.

These playbooks are designed to guide you through the steps of the intake process. Within the playbooks, you can locate the tasks that are assigned to the case, view all ongoing activities with the associated actions, and do the actions on the assigned tasks. The activity stream for the case playbook enables you to track your progress. If it's available, you can also see the related information about the case.

Navigating the catalog to create an onboarding request

You can navigate the catalog to create a new onboarding request from the Customer or Consumer Service Portals. For detailed steps, see Create an onboarding request from the service catalog.

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Workflow steps

Let's see how a customer creates an onboarding case from Playbooks for Portals. The customer does the following actions:

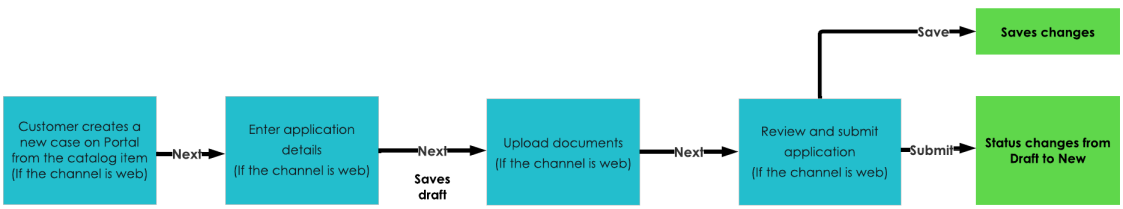
1. Enters the basic information about themselves in a catalog item on one of the portals to open a new case.
2. Adds the details about their application.
3. Uploads the required documents that are needed to process their application.
4. Reviews and edits all the data before submitting the application.
5. Saves all changes and submits the case.

When the customer submits the case, the status of the case changes from Draft to New.

Note: After an application is submitted, the customer can find and view the case updates in the portal by navigating to **My Lists** > **My Draft Cases**.

The following diagram shows how a customer creates a case.

Customer creates a case



Related topics

Creating a guided onboarding case from CRM Workspace

Create an onboarding request from the service catalog

Creating a guided onboarding case from CRM Workspace

An agent can create a case for a contact or a consumer when the contact or consumer reaches out through a phone call, email, or chat from the CRM Workspace.

Overview

If you're a customer accessing a playbook, you can track your progress in the submission process and see the step you’re on and the number of remaining steps that you have to do. Additionally, you can navigate back to a previous step, if needed. To expedite the process, you’re presented with some options and inputs that enable you to enter the correct information.

Creating a case

Let's see how an agent creates a case from Playbooks for Portals. The agent does the following actions:

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1. Creates a case on behalf of the customer.
2. Collects the basic information about the customer to start the case.
3. Adds additional contacts to the application on behalf of the customer.
4. Uploads the documents that the customer may have sent.
5. Reviews and edits all the data for accuracy before submitting the application.

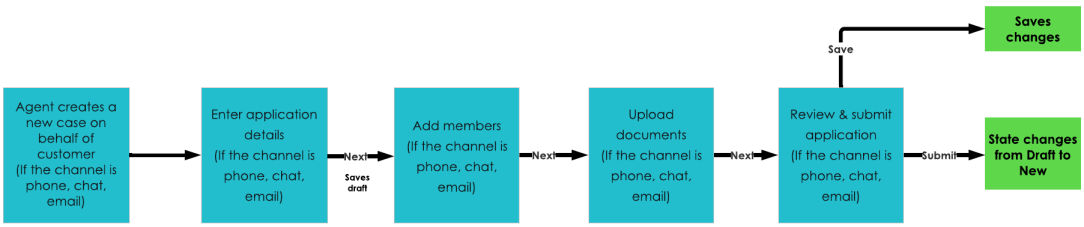
Note:

- The case status changes from Draft to New when it's submitted. The agent must review and choose whether to assign the case to themselves. If the case is assigned to another agent, the new agent must review the context of the case before assigning or accepting the case. The case status changes from New to Open when the case is assigned to an agent.

- If a case is created by an agent, a customer can later find and view the case from the portal for updates by navigating to **My Lists** > **My Draft Cases**.

The following diagram shows how an agent creates a case.

Agent creates a case



Processing a case

Let's see how an agent processes a case from Playbooks for Portals. The agent does the following actions:

1. Initiates the processing for a case by adding members, uploading documents, reviewing and submitting paperwork, and reviewing the case.
2. Pre-approves the case by checking the approval status, customer information, and customer record.
3. Checks the document checklist against the uploaded documents and then sends an email to the customer if there's a missing or invalid document.
4. Performs background checks, initiates legal verifications, and reviews the credit history.
5. Proposes a solution. The customer can accept the solution and then the agent closes the case. If the customer isn't satisfied with the proposed solution and rejects it, the case goes back to the **Open** state and the customer is notified of the status. The agent then needs to provide a new solution based on the customer input.

The following diagram shows how an agent processes a case.

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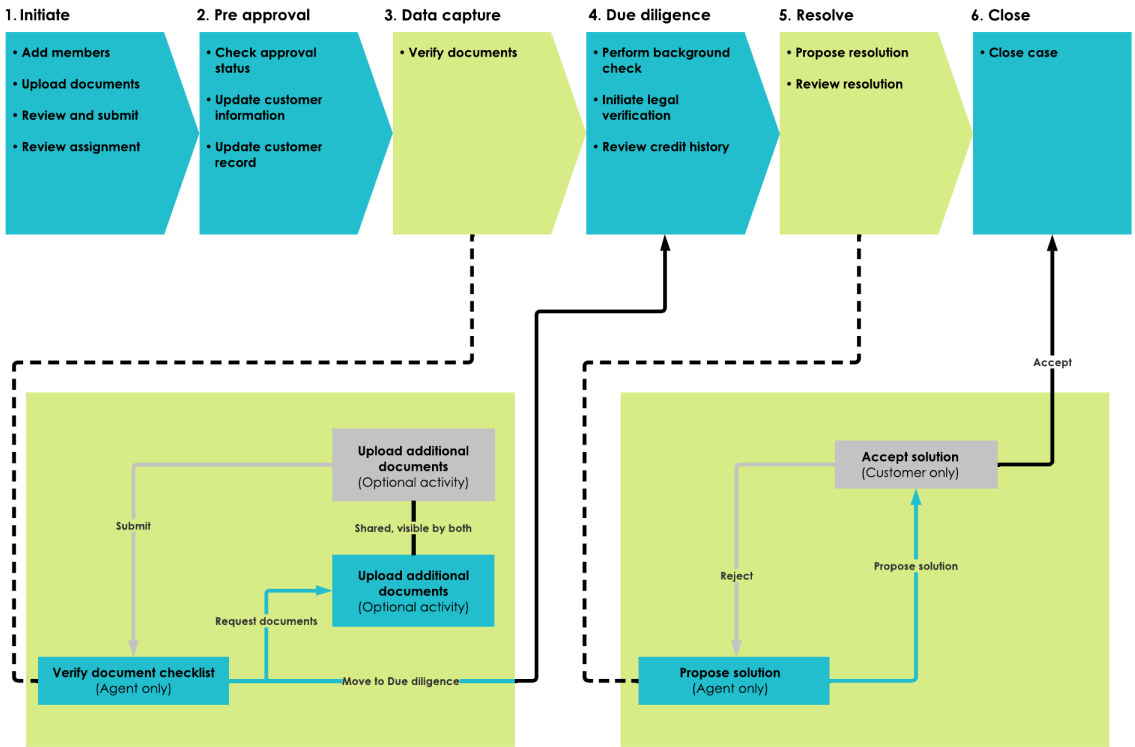
Agent processes a case



Related topics

Create an onboarding request from the service catalog

Creating an onboarding case with Playbooks for Portals

Create an onboarding request from the service catalog

Create a new onboarding request from the Customer or Consumer Service Portals by navigating the service catalog.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer, sn_csm_proxy_cont, admin

Procedure

1. Create a request by going to either the portal landing page or the portal menu header and then doing one of the following actions.

Option	Description
Request Something	On the portal landing page, select the **Request Something** link.
Requests	In the portal menu header, navigate to **Requests** > **Request Something**.

2. Browse the service catalog and select **Support** > **New Guided Onboarding Request**.
   You can also use the category filters to filter the available items or search the catalog.

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3. In the case intake draft page, fill in the information that is related to the request.
4. Select **Submit**.

Result
The system processes the request, creates the request and any other related records, and displays the details in the Related Records widget on the case view page.

Related topics

Creating an onboarding case with Playbooks for Portals

Creating a guided onboarding case from CRM Workspace

Create an onboarding request from the service catalog

Using Walk-up Experience

Customers can use the Walk-up Experience feature to check in at a walk-up location and schedule or modify appointments from the Customer Service Portal. Walk-up Experience managers can access the CSM Walk-up Experience dashboard to monitor the performance of agents and service locations.

Customers can use the Walk-up Experience feature to complete the following tasks:

- Check in at a walk-up location and join a requester queue.
- Schedule an appointment or join a requester queue from the Customer Service Portal.
- Schedule an appointment as a guest user.
- Modify or cancel a walk-up appointment as a guest user.
- Monitor requester queues.

Walk-up experience technicians and managers can view and manage walk-up interactions and queues and view the CSM Walk-up Experience dashboard.

- CSM Walk-up Experience dashboard
- Manage queues and interactions

Check in at a walk-up location

As a store representative, you can enable customers to check in on arrival at your service location. The user is added to the requester queue after filling in some details and a reason for the visit.

Before you begin
Role required: sn_walkup.walkup_login

About this task
A device at the store location runs the Walk-up application. The application welcome screen includes selections to check in for a service, view the list of requesters currently in the queue, and complete a survey. Both guest users and registered users can access the selections on the welcome screen.

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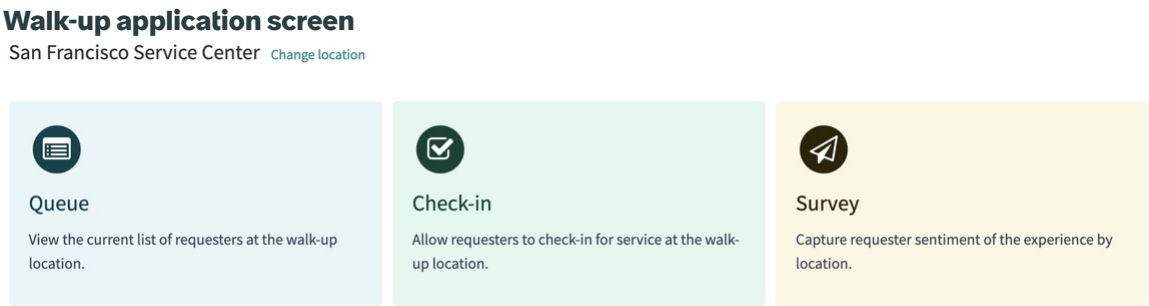

Procedure

1. Select **Check-in** from the Walk-up application screen.
2. Add details in the Check-in screen.

   If the system already has a contact or a consumer with the same details, it associates the interaction with that particular contact or consumer in the system.

   Check-in screen

3. Following check-in, you can view the queue status by selecting **Queue** from the Walk-up application screen.

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The **Queue** widget enables you to view the list of requesters at the walk-up location. For more information, see Monitor Walk-up Experience queues.

Queue status screen

The **Survey** widget allows you to request the requester for feedback about the experience at the location. For more information, see CSM Walk-up Experience customer satisfaction surveys.

Schedule appointments or join a queue from the Self Service portals

Customers must invest time in coming to a physical location for service. The ability to book appointments at a specific time helps plan visits to the service location. A slot is pre-assigned based on the appointment booking.

Before you begin

Role required: sn_walkup.walkup_login

Procedure

1. Log in to the customer portal.
2. Navigate to **Support**>**Walk-up Check In** from the portal header.
   The application searches for your nearest service center.
3. Select **Change location** and select the location you prefer from the drop-down list.

   The default location is set to the nearest service center based on your location information if you enable the browser to access your location. You can select the location manually if you don't want the browser to detect your location.
4. Go to the **Schedule an appointment** tab to book an appointment.
5. Select a reason for your visit from the drop-down list.
   Related content that may help with your issue is listed at the bottom of the screen.
6. Select a reason for your visit from the drop-down list.
7. Select the Calendar icon and then select the date and time of the appointment.
8. Select **Schedule Appointment**.

   You'll receive the following notifications by email when you perform the following actions:

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- Appointment confirmation, reminder, and cancellation.
- Survey email.

Note: You can come back to the portal to reschedule or cancel the appointment if the appointment date hasn't passed.

Schedule a walk-up appointment as a guest user

Schedule walk-up appointments as a guest user from either the Customer Service Portal or Consumer Service Portal.

Before you begin

Role required: none

Procedure

1. Go to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.
2. Select **Walk-up Check-in**.
3. Select **Allow** to use your current location or select the location you prefer from the **Select the location** drop-down list.
   The Welcome to Walk-up Check-in screen is displayed.

   Note: A user with login credentials can also log in through the guest Walk-up Check-in link to book an appointment.

4. Select the **I'm not a robot** check box and verify that you aren't a robot.
5. Fill in the fields.

   Guest user appointment fields

Field	Description
Enter your name	Your first name and last name.
Enter your email address	Your email address.
Enter your phone number (optional)	Your phone number. **Note:** This field doesn't accept alphabetical characters.
What is the reason for your visit?	The reason for your visit.
When do you want to visit?	The date you want to visit. Click the calendar icon, select the desired date and time for the appointment, and click **Select**.

   The default location name, description, hours of operation, and **Get Directions** link are displayed on the right.

   Note: If you have chosen to select a location, the **View on map** link appears instead.

6. **Optional:** Change the location manually.

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a. Click **Change Location**.

b. Select a location from the drop-down list.

7. Click **Schedule appointment**.
   You'll receive a verification email.

   Note: You can also select **Cancel appointment** on the same Welcome to Walk-up Check-in screen. Confirm the cancellation in the dialog box that appears and cancel the appointment.

8. Select **Verify** or select the link to confirm your appointment from the email you receive.
   The appointment is confirmed and the details are displayed on the confirmation screen. If you want to verify your appointment once this screen Is no longer displayed, you can select the link in the appointment confirmation email to display it again.

Modify or cancel a walk-up appointment as a guest user

Modify or cancel walk-up appointments that you have scheduled.

Before you begin

Role required: none

Procedure

1. Open the appointment confirmation email that you received.
2. Click the link in the email to modify or cancel your appointment.
   A One-time Passcode Verification tab opens in the browser and an email containing a one-time passcode (OTP) and a link to verify your appointment is sent.
3. Enter the OTP in the verification tab and click **Continue** or click **Verify your Appointment** in the email.
   The OTP option is useful when you are handling multiple devices to check emails and book appointments. For example, you can view the email with the OTP on your mobile and enter the OTP while booking an appointment on your desktop.

   Note: The link expires after a certain time.

   The Your Appointment details screen opens.
4. Either cancel the appointment or modify it.
   - To cancel the appointment, click **Cancel appointment**. You will receive an email to confirm that your appointment is cancelled.
   - To modify the appointment, modify the details and click **Update**.

Monitor Walk-up Experience queues

Once you check in at a location, you are notified of the wait time and your position in the queue. You can view the issues being serviced and the queue.

Before you begin

Role required: Customers

Procedure

1. Log in to the customer service portal.
2. Select your location.
3. Click the **Queue** widget.

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4. You can view the following information:
   - queue of everyone waiting for service
   - names of people who are ahead of you
   - status of people currently served and waiting in the queue
   - respective agents who are serving the customers

CSM Walk-up Experience dashboard

As a service manager you can see key metric reports for walk-up interactions which helps in monitoring the performance of agents and service locations.

Access the dashboard by navigating to **All** > **Platform Analytics** > **Library** > **Dashboards**. To view detailed information, hover over any report graphic. You can save graphs as PNG or JPEG files and attach them to emails or include in reporting presentations. All graphs can be refreshed for the latest data. The following screen is an example of how the dashboard appears.

Walk-up Experience for CSM dashboard

End user and goal	Required role
Customer service administrator: Can edit the dashboard and manage users, groups, and roles for the dashboard.	admin
Walk-up Experience administrator: Can view the dashboard and manage users, groups, and roles for the dashboard.	sn_csm_walkup.walkup_admin
Walk-up Experience manager: Can track the number of walk-ups, walk-up interactions with cases, average service and wait time and so on.	sn_csm_walkup.walkup_manager

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Data visualizations

Title	Type	Description
Completed Walk-ups for the Quarter		Total number of records created during the fiscal business quarter. Volume shown as a single score.
Exit Survey CSAT for this Year		Speedometer showing the average customer satisfaction sentiment (1 to 3) during the exit survey for the current calendar year.
Overall CSAT within Last Year		Speedometer showing the average customer satisfaction sentiment (1 to 5) captured by the email survey within the last year (364 days from current date).
Walk-ups by Location within Last Year		Total number of walk-up interactions, by location within the last year (364 days from current date). Volume shown as a spline distributed by month.
Walk-up Interactions with Cases by Location within Last Year		Total number of walk-up cases, by location within the last year (364 days from current date). Volume shown as a spline distributed by month.
Walk-up Reasons by Location within Last Year		Reasons for visiting the walk-up queue, by location within the last year (364 days from current date). Data shown as a bar chart.
Walk-ups by Day of the Week		Total number of walk-up interactions per day during the course of a week, by location. Data shown as a bar chart.
Walk-ups by Hour		Total number of walk-up interactions, by hour and by location. Data shown as a bar chart.
Average Service Time by Location		Average time it takes to close an interaction, by location. Time average shown as a spline by month.

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Title	Type	Description
Average Wait Time by Location		Average time a walk-up guest waits for service, by location. Data shown as a bar chart.

Walk-up Experience queue and interaction management

Walk-up Experience managers and technicians can efficiently manage all aspects of a walk-up location queue and interaction demand. Technicians can view assigned walk-up locations and interactions for walk-up fulfillment.

Walk-up Experience provides technicians with inclusive fulfiller resources to organize and manage a walk-up queue.

As a Technician you can access CRM Workspace to manage a walk-up interaction. Using CRM Workspace you can:

- Access a personal inbox to view work assigned from multiple service channels, including the Walk-up Service Channel.
- Get assignments automatically pushed to your inbox from the walk-up interaction queue.
- Work on concurrent or multiple interactions at the same time.
- Promote interactions to cases.
- Work with any requester in the queue at any time by pulling from anywhere in the queue list, as well as from the top of the list.
- Create cases for interactions
- Manually pick an interaction specific to a requestor
- Use Agent Assist to expedite fulfillment.

As a technician you can typically fulfill interactions on a first-come-first-served basis as interactions are pushed to individual walk-up inbox. Interactions are distributed to the walk-up agent inbox based on assignment rule configurations in the Advanced Work Assignment feature.

Technicians can directly open cases in CRM Workspace when an issue is not resolved at the walk-up location.

Walk-up Experience also includes a **Technician** module in the application navigator where agents supporting a walk-up queue can perform the following actions:

- Access the personal walk-up inbox linking directly to Agent Workspace.
- View assigned walk-up interactions.
- Reassign and modify walk-up interactions when necessary.
- View all scheduled and upcoming appointments.
- View walk-up queue locations.
- Transfer walk-up interactions to other technicians or queue locations when necessary.

The following applications are included in the platform **Technician** module of the CSM Walk-up Experience navigation bar as well as viewed in the CRM Workspace under Walk-up:

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CSM Walk-up Experience technician applications

UI view and application	Description
Platform: **My Walk-up Inbox** CRM Workspace: **Inbox**	View walk-up interactions assigned to you in your personal inbox in CRM Workspace. Advanced Work Assignment pushes interactions to your inbox according to assignment rule configurations.
Platform: **My Walk-up Locations** CRM Workspace: **Walk-up Locations**	View walk-up queue locations that you are assigned to support by physical address.
Platform and CRM Workspace: **My Assigned Walk-ups**	View walk-up interactions you are assigned to resolve or fulfill. These interactions have a **Work in Progress** state. You can also see your assigned interactions in your personal inbox on Agent Workspace.
Platform and CRM Workspace: **Open - Unassigned**	View all open and unassigned walk-up interactions for your queue locations. These interactions have either a **New**, **Queued**, or **Work in Progress** state.
Platform and CRM Workspace: **Closed Walk-ups**	View all closed walk-up interactions. Closed interactions have either a **Closed Complete** or **Closed Abandoned** state.
Platform: **Scheduled Appointments** CRM Workspace: **Appointments**	View all upcoming appointments scheduled for your walk-up queue.

View assigned Walk-up Experience location

Walk-up Experience technicians can view a list of the walk-up queues they're assigned to support. Location queues reveal all the information that a technician must know to operate the queue efficiently.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

There are two ways technicians can view the walk-up location queues they're assigned to support. Technicians primarily access CRM Workspace for all CSM Walk-up Experience related information, including locations. However technicians can also access CSM Walk-up Experience in the application navigator, or side navigation bar, to view assigned queue locations.

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Procedure

1. To view walk-up locations, open CRM Workspace.
2. Select **List** in the left navigation bar.
3. Under **Walk-up**, select **Walk-up Locations**.
   Walk-up locations you're assigned to support are listed.
4. Select a queue name to view details about the location, such as, interactions, appointments, reasons for visits, and more.
5. Alternatively, to view walk-up locations via the application navigator, navigate to **CSM Walk-up Experience** > **Technician** > **My Walk-up Locations**.
6. Select a queue name to see details about the location, such as, interactions, appointments, reasons for visits, and more.
   If interactions are leftover from a previous day or are still queued in the end with no associated guests at the queue, you can select **Abandon All** to cancel these interactions.

View Walk-up Experience inbox

View a personal inbox of automatically assigned Walk-up Experience interactions using the CRM Workspace feature interface.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

There are two ways technicians can view the walk-up inbox. Technicians primarily access CRM Workspace for all Walk-up Experience related information, including the inbox. However technicians can also access CSM Walk-up Experience in the application navigator, or navigation bar, to link to and view the inbox in CRM Workspace.

Procedure

1. To view the walk-up inbox, open CRM Workspace.
2. Select **Inbox** in the navigation bar of the interface.
   Automatically pushed interaction assignments appear in the inbox based on agent schedules and assignment rule configurations in the Advanced Work Assignment feature. Technicians can set an inbox status of **Available**, **Away**, and **Offline**.
3. Alternatively, to view the walk-up inbox via the application navigator, navigate to **CSM Walk-up Experience** > **Technician** > **My Walk-up Inbox**.
   You're linked directly to your personal inbox in CRM Workspace. Automatically pushed interaction assignments appear in the inbox based on agent schedules and assignment rule configurations in the Advanced Work Assignment feature.

Manage automatically assigned Walk-up Experience interactions

Technicians supporting CSM Walk-up Experience locations can view and manage interactions automatically pushed to the CRM Workspace inbox.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

Walk-up Experience interactions can be automatically pushed to a personal inbox in CRM Workspace based on agent schedules and assignment rule configurations in the Advanced Work Assignment feature. Technicians fulfill interactions on a first-come-first-served basis as they appear in the inbox.

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To manually assign and manage interactions using the CSM Walk-up Experience Technician modules found in the application navigator, refer to Manage Walk-up Experience interactions manually.

Technicians set a status in the CRM Workspace inbox to indicate readiness to accept interactions. Status choices are **Available**, **Away**, and **Offline**.

Even though interactions are automatically pushed to the walk-up inbox, agents can work with anyone in the walk-up queue at any time.

View walk-up queue interactions assigned to you automatically in your walk-up inbox or in your **My Assigned Walk-ups** list. You can also view all **Open - Unassigned** interactions for the queue you support.

With CRM Workspace you can view lists of all your related walk-up interactions and appointments, your cases, customer accounts and contacts, incidents, requests, and more using one convenient interface. The Walk-up Experience related interaction list includes the following items:

Walk-up Experience related interaction list

List item	Description
My Assigned Walk-ups	Interactions you assign to yourself when you accept an active interaction or that are assigned to you. Agents assign interactions to themselves when they accept a queued interaction. Managers can assign interactions to specific agents. These interactions are in a Work in Progress state. Once assigned, an agent can transfer the interaction to another agent or queue to complete the work, if necessary.
Open — Unassigned	All open but unassigned interactions associated with your specific walk-up queue location. When a guest checks into a walk-up queue, an interaction is created. The interaction is Queued until an agent accepts it or is assigned the interaction. At that point, the state changes to Work in Progress.
Closed Walk-ups	All Closed Complete and Closed Abandoned interactions assigned to a specific walk-up location queue. Agents can abandon an interaction when a guest leaves the queue before receiving support.

Procedure

1. To begin supporting a walk-up queue guest, open CRM Workspace.
2. Select **Inbox** and ensure your status is set to **Available**.
   You can view interactions in your inbox that are automatically assigned to you.
3. Select the interaction at the top of the list and begin resolving the issue or fulfilling the request.

   When you create an associated case, a **New Case** tab opens next to the **Details** tab of the original interaction. Fill out the new case form. Select **Save** to save the new case.

   If an interaction requires an unusual amount of time to resolve or fulfill, you can place the interaction on hold. The requester does not lose position in the queue and you can help another requester simultaneously. Placing an interaction on hold does not affect your capacity for new interactions.

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a. To put an interaction on hold, select **Put on Hold**.

b. You can associate the interaction with another record by selecting **Associate Record** from the more UI actions icon in the interaction header.

c. If you can't resolve an issue, select **Create Case** in the interaction header.

When you create an associated case, a **New Case** tab opens next to the **Details** tab of the original interaction. Fill out the new case form. Select **Save** to save the new case.

4. When you finish resolving the interaction, select **Close** in the interaction header.
Closing an interaction affects your capacity and can result in new interactions being pushed to your inbox.

Manage Walk-up Experience interactions manually

Technicians supporting walk-up locations can manually manage queue requests with several CSM Walk-up Experience interaction-related modules.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

Manage interactions manually using the CSM Walk-up Experience Technician modules found in the application navigator. To manage automatically assigned interactions from the CRM Workspace inbox, refer to Manage automatically assigned Walk-up Experience interactions.

Walk-up queues support guests in the order that they check into the queue — first come, first served. Technicians supporting the queue can decide who will work the first interaction. As new guests enter the queue and submit interactions, technicians share the workload, assigning queued interactions to themselves.

View walk-up queue interactions using several Walk-up Experience modules:

Walk-up Experience interaction modules

Module	Description
My Assigned Walk-ups	Interactions you assign to yourself when you accept an active interaction or that are assigned to you. Agents assign interactions to themselves when they accept a queued interaction. Managers can assign interactions to specific agents. These interactions are in a Work in Progress state. Once assigned, an agent can transfer the interaction to another agent or queue to complete the work, if necessary.
Open — Unassigned	All open but unassigned interactions associated with your specific walk-up queue location. When a guest checks into a walk-up queue, an interaction is created. The interaction is Queued until an agent accepts it or is assigned the interaction. At that point, the state changes to Work in Progress.
Closed Walk-ups	All Closed Complete and Closed Abandoned interactions assigned to a specific walk-up location queue. Agents can abandon an interaction when a guest leaves the queue before receiving support.

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Procedure

1. To begin supporting a walk-up queue guest, navigate to > **CSM Walk-up Experience** > > **Technician** > **Opened - Unassigned**.
   The Interactions list opens.
2. Find the guest name under the **Opened for** column of the Interactions list.
3. Click the interaction **Number** associated with the guest.
4. Enter your name in the **Assigned to** field on the form, change the **State** to **Work in Progress**, and click **Update**.
   a. To close an interaction if the guest has left the queue, click **Abandon** in the form header or choose **Closed Abandoned** from the **State** form field and click **Update**
   b. Alternatively, you can associate the interaction with another record by clicking the **Associate Record** button in the interaction header.
5. To resolve the interaction, navigate to **Walk-up Experience** > **Technician** > **My Assigned Walk-ups**.
6. Click the interaction number from the list to open the Walk-up Interaction form.
7. Resolve the issue or fulfill the request.
   a. Change the interaction status to **On Hold** if the requester is not present for an appointment or if the interaction entails a lengthy process, for example, an OS upgrade.
   b. If you cannot resolve the issue or fulfill the request, click the **Create Case** related link to create a case.

   When you create a case, the associated related lists on the form populate. Related lists include the following details:

   - Cases for Interaction: Cases associated with the interaction
   - Cases by Same Caller: Cases created for a walk-up guest

   When you finish resolving the interaction, change the interaction **State** to **Closed Complete** and click **Update** to update the interaction. Alternatively, you can click **Close** to complete the interaction.
8. When you finish resolving the interaction, change the interaction **State** to **Closed Complete** and click **Update** to update the interaction.
   You can also click **Close** to complete the interaction.

View and manage Walk-up Experience appointments in Agent Workspace

Viewing upcoming scheduled CSM Walk-up Experience appointments provides technicians with an estimate of future queue demand and workload. Managers can view future appointments and adjust staffing at walk-up queue locations to best support demand.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

Technicians and managers primarily use CRM Workspace for all Walk-up Experience related information, including viewing and managing scheduled appointments.

Note: You can also view and manage scheduled appointments from the CSM Walk-up Experience in the application navigator, or left navigation bar.

Appointments are automatically routed to your CRM Workspace inbox based on availability. You can also view a list of scheduled appointments and choose which one to accept.

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Upcoming appointments also display with a small calendar icon next to the user name on the onsite walk-up location queue wall monitor. The user with an appointment appears on the monitor a short time before the appointment is scheduled to begin.

Note: Upcoming appointments are also displayed on the online check-in screen with the same calendar icon next to the user name.

Procedure

1. Open CRM Workspace.
2. Select **List** in the left navigation bar.
3. Under **Walk-up**, select **Appointments**.
   Walk-up appointments assigned to your queue are listed.
4. Select an appointment number to view details, such as the requester name, the interaction number and description, and the appointment time.

   a. To open the associated interaction to view details, select the Open record icon next to the interaction number.

   b. Select **Accept appointment** to begin working on the interaction.

      If necessary, you can assign the appointment to another agent and add work notes.

      If a significant amount of time has passed and the requester doesn't show up for the appointment, you can delete the appointment by selecting the More UI actions icon in the interaction header and choosing **Delete**.

   c. Select **Save** to save any changes you make to the appointment interaction.

Manage appointments in the navigator

Viewing upcoming scheduled Walk-up Experience appointments provides technicians with an estimate of future queue demand and workload. Managers can view future appointments and adjust staffing at walk-up queue locations to best support demand.

Before you begin

Role required: sn_csm_walkup.walkup_technician

About this task

Technicians and managers can view and manage scheduled walk-up appointments from Walk-up Experience in the application navigator, or left navigation bar.

Note: Primary access is through CRM Workspace for all Walk-up Experience related information, including scheduled appointments.

Upcoming appointments also display with a small calendar icon next to the user name on the onsite walk-up location queue wall monitor. The user with an appointment appears on the monitor a short time before the appointment is scheduled to begin.

Procedure

1. Navigate to **All** > **CSM Walk-up Experience** > **Technician** > **Scheduled Appointments**.
   All walk-up appointments scheduled for the upcoming 14 days display.
2. Select an appointment number to view details, such as the requester name, the interaction number and description, and the appointment time.

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a. If desired, to preview the associated interaction details, select the preview record icon next to the appointment number.

b. To begin working on the interaction, select **Accept appointment** on the **Walk-up Appointment** form.

   If necessary, you can assign the appointment to an agent and add work notes.

   If a significant amount of time has passed and the requester does not show up for the appointment, you can delete the appointment by clicking **delete**.

c. Select **Update** to save any changes you make to the interaction form.

Using Auto-Responder for case deflections

Deflect cases by automatically sending relevant content through the Auto-Responder feature after a customer contact or consumer creates a case.

Whenever a case is created, the Auto-Responder feature sends an email notification containing a list of relevant knowledge articles. The email notifications are sent to the case submitter and watchlist users associated with the case.

By default, the feature sends the email notification for customer service cases logged using emails by users with the snc_external role. Your administrator can also configure the feature for customer service cases logged using other communication channels such as web, phone, chat, social, community, alert, and virtual agent.

The knowledge articles in an Auto-Responder email notification are included based on contextual search results of the short description of the case. By default, the articles that a case submitter viewed in the last 30 days aren't included. Your administrator can configure the duration of last viewed content by using a scripted extension point. For more information, see Include advanced contextual search results in Auto-Responder notifications.

As a case submitter or watchlist user, you can determine whether you receive any Auto-Responder notifications by setting notification preferences. For more information, see Set Auto-Responder notification preferences.

Activation information

Activate the Predictive Intelligence for Customer Service Management plugin (com.snc.csm_ml) and enable the **Enable auto-responder recommendations** property (*`sn_customerservice.case.autoresponder.enable`*). For more information, see Configure Auto-Responder notifications.

Close a case from a knowledge article recommended in an Auto-Responder notification

View knowledge articles included in the email notification sent by the Auto-Responder feature for a customer service case and close the case from within a helpful knowledge article.

Before you begin

Role required: snc_external role or watchlist users associated with the customer service case

Log in to your portal containing the case.

About this task

By default, the Auto-Responder feature sends knowledge articles as helpful content to solve a customer service case submitted using an email.

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Procedure

1. Open the knowledge article link from the email notification sent by Auto-Responder.
2. Read the knowledge article to see whether it resolves a case.
3. If the knowledge article provides a solution, in the Related Case section of the article, click **Close Case**.
4. In the message window that appears, click **Close Case**.

Result

An information message about the case being closed appears. If any case was closed by using a knowledge article link accessed from an Auto-Responder email notification, a **View Case** button appears in that article. Click the button to view the details of the case that was closed.

Set Auto-Responder notification preferences

Set notification preferences for receiving Auto-Responder recommendations on customer service cases you submitted or for which you are on the watchlist.

Before you begin

Role required: snc_external role or watchlist users associated with the customer service case

Ensure that an administrator has configured the Auto-Responder feature. For more information, see Configure Auto-Responder notifications.

Procedure

1. Navigate to your portal page.
2. Click your username or photo in the portal header, and then click **Profile**.
3. On the User Profile page, scroll down to the Actions section, and click **Notification Preferences**.
4. On the Notification Preference window, select or clear the **Case auto-responder recommendations** check box to turn the Auto-Responder notifications on or off for you.

Using Omnichannel Callback for Customer Service Management

The ServiceNow® Omnichannel Callback for Customer Service Management app enables a callback option for customers when there's a long wait time for a live agent.Additionally, agents can schedule callbacks on behalf of customers from CRM Workspace

For more information, see Omnichannel Callback.

Callback flow

The callback workflow proceeds as follows:

1. Customers are presented with an option to request a callback when the estimated wait time to reach an agent is too long or when agents are unavailable.
2. The customer enters callback details such as name, contact details, and the reason for the callback.
3. Customers request a callback as soon as possible or at a specified date and time.
4. A callback interaction is created immediately for an immediate callback request or a minute before the selected time for a scheduled callback request.
5. The ServiceNow® Advanced Work Assignment (AWA) application determines the availability of agents and creates a callback work item for an available agent. AWA adds the callback task to the callback queue. The agent then receives a Callback notification in the workspace inbox.

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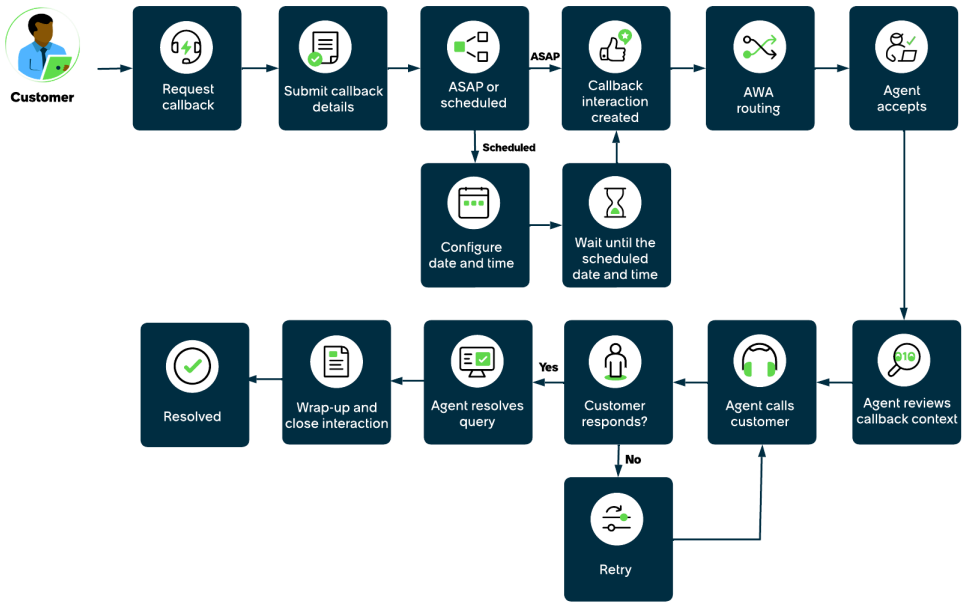
6. The agent can choose to review the callback context such as knowledge base article views, searches, and Virtual Agent conversation before calling the customer.
7. The agent calls the customer.
   - If the customer accepts the call, the interaction is marked as complete when the call ends.
   - If the customer doesn't accept the call, the agent can retry the callback later.
8. The agent can decide to close the interaction or queue the callback again manually from the workspace.

Callback flow diagram



Callback requests

Immediate callback request

Customers can request a callback immediately. The customers are shown the average time that the agent takes to call back. This request helps to prevent them from having to wait in the queue to connect with an agent.

Scheduling a callback request

Customers can request a callback by selecting the preferred date and time. The customer will receive a confirmation of the scheduled callback request via email.

Rescheduling a callback request

Customers can reschedule the callback request by choosing from a list of upcoming dates and times for callback requests.

Cancelling a callback request

Customers can cancel scheduled callbacks from the self-service channel they requested the callback from.

Agent-scheduled callbacks

In addition to customer-scheduled callbacks, agents can now create callbacks on behalf of customers from CRM Workspace. Agent-scheduled callbacks can be created from any omnichannel interaction (chat, voice, email, messaging) or case records. Agents can schedule, reschedule, and cancel callbacks.

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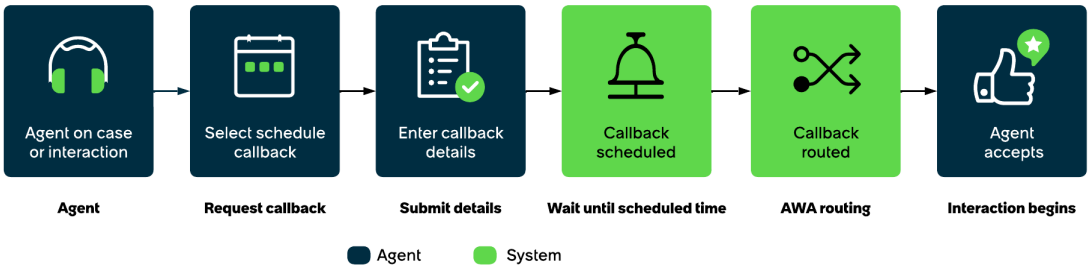
The following diagram shows the agent-scheduled callback workflow.

Agent-scheduled callback flow



Agent-scheduled callback workflow

The agent-scheduled callback workflow proceeds as follows:

1. Callback creation: While working on a case or during an active interaction, the agent selects Schedule Callback. In the scheduling widget, the agent enters the customer's callback number, preferred date and time, reason for the call, and a short description. The widget displays the customer's time zone. The agent selects **Schedule**.
2. Callback task created: The system creates a callback task and links it to the related case or interaction. The callback task state is set to Open.
3. Callback confirmation: A confirmation message is displayed indicating that the callback has been scheduled for the customer at the specified time. The message includes a link to the callback record.
4. Viewing and managing: Agents can view active callbacks from the Scheduled Callbacks list view and as tiles in the contextual side panel. From either view, agents can reschedule or cancel callbacks for the contact or consumer.

Callback channels

Customers can request a callback during a chat on Virtual Agent or Engagement Messenger, or from Customer Service Portal. They can request either a phone callback or a video callback on Zoom. Video callbacks must be scheduled but phone callbacks can be requested immediately or scheduled.

Related topics

Working with callback requests from customers

Callback requests by agents

Working with callback requests from customers

Customers can request a callback from an agent when the wait time to reach an agent is too long or agents are unavailable.

Callback requests by customers

Customers can request a callback either as soon as possible or at a preferred date and time from one of the following channels:

- Virtual Agent
- Customer Service Portal
- Engagement Messenger

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Customers can request an immediate callback on a voice channel such as phone or schedule a video callback over Zoom.

Callback requests for agents

The agents can perform the following actions:

- Review the context of the interaction such as knowledge base article views, search history, and the Virtual Agent conversation before calling the customer to become familiar with the context.
- Use the **Click-to-call** button to make a voice call to a customer either as soon as possible or at a scheduled date and time.
- Use the Zoom meeting URL to make a video call to a customer at a scheduled date and time.
- Retry the callback if the customer does not accept the call.
- Reroute the callback request to a different agent.

Working with callback requests using Virtual Agent

As a customer, you can request a callback from a customer service agent through a Virtual Agent conversation. You can request an immediate voice callback or schedule a voice or video callback that you can reschedule or cancel.

For more information about setting up Omnichannel Callback, refer to Configuring Omnichannel Callback

Request a callback from a Virtual Agent chat

Request an immediate voice callback or schedule a voice or video callback from a Virtual Agent chat on the ServiceNow portal.

Before you begin

Role required: none

About this task

You can request an immediate callback only for a voice channel. Use the **Schedule for later** option to request a video call.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example

   For example: `https://yourportalurl.com/csm`

2. Select the Chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Select **Show me everything**.
4. Select **Request a callback**.
5. Enter your phone number and a reason for requesting the callback.
6. Select whether to receive an immediate voice callback from an agent or schedule a voice or video callback for later.

Type of callback	Action
Immediate voice callback	Select **Right now**.

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Type of callback	Action
Scheduled voice or video callback	**a.** Select **Schedule for later**. **b.** Select the type of call. ▪ For a phone call, select **Voice**. ▪ For a video call, select **Zoom**. **c.** Select a date and time from the calendar and select **Schedule**. The date and time slots indicate the agent's availability.

Result

- A callback request is created.
- The chat shows the details of the callback time, either the estimated time until the agent phones back or the scheduled date and time set for the phone or video call.
- A confirmation email is sent.

Reschedule a callback from a Virtual Agent chat

Reschedule a callback from a Virtual Agent chat on the ServiceNow portal.

Before you begin

Role required: none

About this task

Only logged-in users can reschedule callbacks.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Select the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Select **Show me everything**.
4. Select **Reschedule a callback**.
5. Reschedule the upcoming callback request or a different request.
   - To reschedule the upcoming callback request, select **Yes**.
   - To reschedule a different request, select it from the list of requests.
6. Choose a date and time from the calendar and click **Schedule**.
   The date and time slots indicate the agent's availability.

Result

The request is rescheduled.

A confirmation message is displayed in the chat.

A confirmation email is sent.

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Cancel a callback from a Virtual Agent chat

Cancel a callback from a Virtual Agent chat on the ServiceNow portal.

Before you begin

Role required: none

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Select the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Select **Show me everything**.
4. Select **Cancel a callback**.
5. Cancel the upcoming callback request or a different request.
   - To cancel the upcoming callback request, select **Yes**.
   - To cancel a different request, select it from the list of requests.
6. Confirm the cancellation in the confirmation message.

Result

- The callback request is canceled.
- The chat shows the details of the canceled callback request.
- A confirmation email is sent.

Working with callback requests using the Customer Service Portal

As a customer, you can request a callback from a customer service agent using the Customer Service Portal. You can request an immediate callback or schedule a voice or video callback that you can reschedule or cancel.

Request a callback using the Customer Service or Consumer Service Portal

Request an immediate voice callback or schedule a voice or video callback from an agent using the Customer or Consumer Service Portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task

You can request an immediate callback only for a voice channel. Use the **Call me later** option to request a video call.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Select **My Lists** in the portal header and then select **My cases**.
3. Select the case for which you need support.

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4. In the **Actions** section, select **Request callback**.
5. In the Request a callback pop-up window, enter your name, phone number, issue type, and description.
6. Select whether to receive an immediate voice callback from an agent or schedule a voice or video callback for later.

Type of callback	Action
Immediate voice callback	Select **Call me now**.
Scheduled voice or video callback	**a.** Select **Call me later**. **b.** Select the type of call. ▪ For a phone call, select **Voice**. ▪ For a video call, select **Zoom**. **c.** Select a date and time from the calendar. The date and time slots indicate the agent's availability.

7. Select **Submit**.

Result

- A callback request is created.
- The details of the callback request are available in the Callback tab.
- A confirmation email is sent.

Reschedule a callback using the Customer Service or Consumer Service Portal

Reschedule a callback from an agent using the Customer or Consumer Service Portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task

You can reschedule a callback request to receive a phone or video call from an agent.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`
2. Select **My Lists** in the portal header and then select **My cases**.
3. Select the case for which you need support.
4. In the **Callbacks** tab, select the callback request that you want to reschedule.
5. Select **Reschedule**.
6. Choose a date and time from the calendar.

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The date and time slots indicate the agent's availability.

7. Select **Submit**.

Result

- The callback request is rescheduled.
- The pop-up window shows the details of the rescheduled callback.
- A confirmation email is sent.

Cancel a callback using the Customer Service or Consumer Service Portal

Cancel a callback from an agent using the Customer or Consumer Service Portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Select **My Lists** in the portal header and then select **My cases**.
3. Select the case for which you need support.
4. In the **Callbacks** tab, select the callback request that you want to cancel.
5. Select **Cancel**.
6. Confirm the cancellation in the confirmation message.

Result

- The callback request is canceled.
- The details of the canceled callback request are available in the **Callbacks** tab.
- A confirmation email is sent.

Working with callback requests using Engagement Messenger

As a customer, you can request a callback from a customer service agent using Engagement Messenger. You can request an immediate callback or schedule a voice or video callback that you can reschedule or cancel.

Request a callback using Engagement Messenger

Request an immediate voice callback or schedule a voice or video callback from an agent using Engagement Messenger.

Before you begin

Role required: none

About this task

You can request an immediate callback only over a voice channel. Use the **Call me later** option to request a video call.

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Procedure

1. In Engagement Messenger, select the **Request a callback** card.
2. In the Callback requests page, select **Request a callback**.
3. Enter your name, phone number, issue type, and description.
4. Select whether to receive an immediate voice callback from an agent or schedule a voice or video callback for later.

Type of callback	Action
Immediate voice callback	Select **Call me now**.
Scheduled voice or video callback	**a.** Select **Call me later**. **b.** Select the type of call. ▪ For a phone call, select **Voice**. ▪ For a video call, select **Zoom**. **c.** Select a date and time from the calendar. The date and time slots indicate the agent's availability.

5. Select **Submit**.

Result

- A callback request is created.
- A confirmation email is sent.

Reschedule a callback using Engagement Messenger

Reschedule a callback from an agent using Engagement Messenger.

Before you begin

Role required: none

Procedure

1. In Engagement Messenger, select the **Request a callback** card.
2. In the Callback requests page, select the callback request that you want to reschedule.
3. Select **Reschedule**.
4. Choose a date and time from the calendar.
   The date and time slots indicate the agent's availability.
5. Select **Submit**.

Result

- The callback request is rescheduled.
- A confirmation email is sent.

Cancel a callback using Engagement Messenger

Cancel a callback from an agent using Engagement Messenger.

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Before you begin
Role required: none

Procedure

1. In Engagement Messenger, select the **Request a callback** card.
2. In the Callback requests page, select the callback request that you want to cancel.
3. Select **Cancel** .
4. Confirm the cancellation in the confirmation message.

Result

- A callback request is canceled.
- A confirmation email is sent.

Address a callback request from a customer

As a customer service agent, call a customer back either immediately or at the date and time requested by the customer.

Before you begin
Role required: sn_customerservice_agent

About this task
Depending on the type of request, you can call the customer on the phone or over Zoom.

If the callback is requested from the Customer Service or Customer Service Portal, you can look into the customer's issue by going through the chat, related cases, knowledge base searches, and history to become familiar with the context before making the call.

Procedure

1. Open your workspace.
2. When an interaction request comes in, accept it from your inbox.
   The interaction card shows the following information:
   - The type of callback and interaction number
   - The name of the customer
   - The type of issue
3. Call the customer back on the requested channel.

Type of call	Action
Voice	Select the **Click-to-call** button next to the phone number to make a voice call.
Video	Use the meeting URL to make a video call over Zoom.

If the customer doesn't accept the call:

- Retry the callback later by clicking **Re-attempt Callback**.

  The number of retry attempts is updated.

- If necessary, assign the callback task to another agent by selecting **Requeue Callback** from the **More actions** menu.

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4. End the call.
   - The state of interaction changes to **Close complete**.
   - If you have the notify_view role, you can see the video meeting participants in the **Video participants** tab.
   - The meeting recording and transcript are attached to the interaction. The inserted transcripts are not sentiment analyzed.
5. If the issue is resolved, close the callback task by selecting **Close Callback**.

Callback requests by agents

Agents can create callback requests on behalf of customers directly from CRM Workspace when customers request a return call or when follow-up is needed.

When to use agent-scheduled callbacks

Agents typically schedule callbacks in the following scenarios:

- A customer requests a callback at a specific time during a chat, voice, email, or messaging conversation.
- An agent must follow up with a customer after gathering additional information.
- An agent is working on a case that requires a scheduled follow-up call.

How it works

Agent-scheduled callbacks can be created from:

- Omnichannel interactions: Chat, voice, email, and messaging interactions
- Case records: Directly from customer service cases

  When an agent schedules a callback:

  - The agent enters callback details including the customer's preferred callback number, date and time, reason for the call, and a short description.
  - The callback is linked to the related case or interaction for context.
  - At the scheduled time, a callback interaction is created and routed to agents.

Managing agent-scheduled callbacks

Agents can perform the following actions on scheduled callbacks:

- View: View active callbacks in the Scheduled Callbacks list view or as tiles in the contextual side panel.
- Reschedule: Change the date and time of a scheduled callback.
- Cancel: Cancel callbacks that are no longer needed.
- Accept: Accept callback interactions when they're routed.

Related topics

Schedule a callback for a customer

View scheduled callbacks

View related callbacks in the contextual side panel

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Reschedule a callback

Cancel a callback

Schedule a callback for a customer

Schedule callbacks on behalf of customers from CSM Configurable Workspace.

Before you begin

Ensure the following:

- Case Management Core [com.sn_customerservice] plugin is activated
- Omnichannel Callback for Customer Service Management (com.sn_omnichannel_callback) plugin is installed
- Appointment booking [com.snc.appointment_booking] plugin is installed (automatically installed with omnichannel callback [sn_callback] plugin)
- System property `sn_callback.enable_agent_scheduled_callback` is enabled

Role required: sn_omni_callback.callback_writer

About this task

Agent-scheduled callbacks enable agents to create callback tasks while interacting with customers through any channel such as chat, voice, email, messaging, or case.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( )
3. Open a case or interaction.

   Note: The case must be in the Open state or the interaction must be in WIP state.

4. Select **Schedule Callback**.
5. In the Schedule Callback widget, enter the required information.
6. Select **Schedule**

Result

- A confirmation message displays indicating successful callback task creation.
- A callback task is created with the state as Open.
- The callback context shows the related case number (if scheduled from a case).

Related topics

View scheduled callbacks

View related callbacks in the contextual side panel

Reschedule a callback

Cancel a callback

View scheduled callbacks

View all scheduled callbacks in a list view and access individual callback records to reschedule or cancel them.

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Before you begin
Role required: sn_customerservice_agent

About this task
The Scheduled Callbacks list view displays all scheduled callbacks with details such as callback task number, contact or consumer name, callback number, scheduled start time, and reason for the call. Only callbacks with a type as Scheduled and the state as Open are displayed.

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace.**.
2. Select the List icon ( )
3. In the Callbacks section, select **Scheduled callbacks**.
4. Select a scheduled callback to open the callback task record page.

Result
You can view all scheduled callbacks and access the callback task record page to reschedule or cancel them.

View related callbacks in the contextual side panel

View and manage active callbacks for a contact or consumer from the contextual side panel.

Before you begin
Role required: sn_omni_callback.callback_writer

About this task
Only active callbacks are displayed. Completed or canceled callbacks aren't included.

When working on a case or interaction, callback tiles appear automatically in the contextual side panel. These tiles display all active callbacks associated with the same contact or consumer. They appear regardless of which agent scheduled them or which case or interaction they originated from. Agents can select a callback tile to view, reschedule, or cancel the callback.

Procedure
1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace.**.
2. Select the List icon ( )
3. Open a case or interaction.
4. Select the Related lists ( ) icon.
5. Select **Related Callbacks**.
6. View the related callback tiles in the contextual side panel.
7. Select a callback tile to open the callback task record page.

Result
You can view related callbacks and access the callback task record page to reschedule or cancel them.

Reschedule a callback

Reschedule callbacks on behalf of customers when the original scheduled time is no longer suitable.

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Before you begin
Role required: sn_omni_callback.callback_writer

About this task
Reschedule is visible only to agents with the sn_omni_callback.callback_writer role and only for scheduled callbacks.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace.**.
2. Select the List icon ( )
3. In the Callbacks section, select **Scheduled callbacks.**
4. Navigate to the callback task record page by either:
   - Selecting the callback in the Scheduled Callbacks list view, or
   - Selecting the callback tile in the contextual side panel.
5. Select **Reschedule**.

   Note: Reschedule is visible only for scheduled callbacks.

6. In the Reschedule widget, view the current scheduled date, time, and customer time zone.
7. Select a new date and time using the calendar widget.
8. Select **Reschedule**.

Result

- A confirmation message displays indicating the callback has been successfully rescheduled.
- The callback task is updated with the new schedule.
- The state remains as Open.

Cancel a callback

Cancel scheduled callbacks when customers no longer require the callback or the issue has been resolved through other means.

Before you begin
Role required: sn_omni_callback.callback_writer

About this task
Cancel is visible only to agents with the sn_omni_callback.callback_writer role.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace.**.
2. Select the List icon ( )
3. In the Callbacks section, select **Scheduled callbacks.**
4. Access the callback task record page by either:
   - Selecting the callback in the Scheduled Callbacks list view, or
   - Selecting the callback tile in the contextual side panel.
5. In the confirmation modal that appears, confirm the cancellation.
6. Select **Yes** to confirm.

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Result

- A confirmation message displays indicating the callback has been successfully canceled.
- The callback task state is set to Canceled.

Manage a CCaaS callback request in the Configurable Workspace

As a customer service agent, view the callback context information and dial the customer immediately in the CSM/FSM Configurable Workspace.

Before you begin

Role required: sn_customerservice_agent

You must log in to your CCaaS account and ServiceNow Configurable Workspace to receive the callback requests on the Configurable Workspace.

About this task

The callback interaction is either routed in the customer-first or agent-first method by CCaaS to the agent. The interaction appears like any other voice interaction in a customer-first scenario. The interaction appears with callback actions component and callback context card for an agent-first scenario. For more information on the agent-first and customer-first modes, see Integrating contact centers with Interaction Controls Component (ICC) for callbacks. The following procedure is applicable for the agent-first scenario.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.

   Note: The AWA inbox card displays the following information for callbacks:
   - Name of the customer
   - Queue to which the callback is assigned
   - Type of callback (ASAP and Scheduled)
   - Reason for callback

2. Perform one of the following in your inbox when you receive a callback interaction request.

Action	Description
Accept	Select this button to accept the callback inter action request. The voice interaction page opens with the Callback Actions component on the top-left corner of the page. For more details on the callback actions component, see Callback ac tions component.
Reject	Select this button to reject the callback inter action request. The callback interaction gets routed to the next available agent.

3. View the Callback context card for the details of the callback.
   For more information on the Callback context card, see Callback context card.

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4. Use the callback actions card to perform the following actions.

Conversation scenarios	Actions
Talk to the customer and try to address the customer issue	**a.** Select the **Call number** button on the Callback actions component. **Note:** When the timer turns down to zero on the Callback actions component, the call is automatically dialed to the number in the drop-down. The timer must be enabled by the contact center provider for auto-dialing capability. If you get to know that the issue is resolved and the callback isn't required, you can select **Close Callback** and wrap up the interaction. Subsequently, the callback task is closed by CCaaS. **b.** If the customer answers the call, resolve the customer's issue.
Transfer the callback before dialing the call when it falls outside the agent's scope of responsibility to ensure that it reaches the appropriate agent or queue for resolution.	**a.** Select the **Transfer callback** button on the Callback actions component to transfer an ASAP or Scheduled callback to another queue or agent before the call to the customer begins. When you select the Transfer callback button, the Transfer callback subcomponent appears, which includes the following options: ▪ In the search field, select from the list or to transfer the callback. ▪ In the Queues list, select the queue for transfer to which you want to transfer the callback. ▪ In the Agents list, select the agent to whom you want to transfer the callback. **b.** Select the → icon to initiate the transfer callback. When transferring a callback, the Callback actions component displays a Transferring callback, please wait... message and a 'Cancel callback transfer' button. **c.** Select the **Cancel callback transfer** button to cancel the transfer before the receiving agent accepts the request. For more details on how it's displayed in the UI, see CSM voice interaction record page.

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Conversation scenarios	Actions
Retry callback in case the customer doesn't answer the call	**a.** Select the **Retry call** button on the Callback actions component. **b.** If a customer answers the call, address the customer request.
Transfer the call when another agent is better equipped to assist the customer	**a.** Select the transfer icon on the active call component. The call with the customer is placed on hold while you transfer the call to another agent. **b.** In the Agents list, select the agent to whom you want to transfer the call to. **c.** Select the three dot menu and perform one of the following: ▪ Select **Consult** to talk to the agent and provide the context of the callback request. Once the new agent accepts the call, you can select **Merge calls** to merge your current customer call with the new agent or select **Leave & transfer** to disconnect the call with the customer and transfer it to the new agent directly. ▪ Select **Blind** to transfer the call directly to the agent without any consultation. The call gets transferred to the agent directly, and you get disconnected from the call. Upon successful transfer of call to another agent, the callback interaction is assigned to the receiving agent. The callback task remains assigned to the original agent and can be wrapped up.

5. Mute, hold, and record the calls if necessary while you are on an active call with the customer.

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The following table provides a description for the annotations in the preceding image:

Annotation in the preceding image	Description
1	Use the record icon to record the conversation. The recording is saved automatically when you end the conversation.
2	Use the mute icon to mute or unmute the conversation.
3	Use the hold icon to hold or resume the conversation.
4	Use the dialpad to enter a phone number of your choice and press the dial button to make a call.
5	To transfer the call to another agent, select the transfer icon. For more details, see #unique_684_Connect_42_entry-transfer-call.
6	Use the flag icon to escalate customer issue.

6. Update the **Reason** and **Notes** appropriately and select **Submit & close** in the Wrap up modal after ending the call.
   After submitting wrap up, CCaas closes the interaction and callback task.
7. Select **Close callback** on the Callback Action component to close the callback.
   In the automatic dial, the callback gets closed when the timer for closing the callback goes down to zero.
8. Close the interaction page.

Related topics

Integrating contact centers with Interaction Controls Component (ICC) for callbacks

Callback interaction features

Manage a CCaaS callback request using Global Voice Control

Manage a CCaaS callback request using Global Voice Control

As a customer service agent, when you leave the callback interaction page on the CSM/FSM Configurable Workspace during a call, you can use Global Voice Control (GVC) to continue with callback actions. You can return to the interaction page by selecting the **Open interaction** link.

Before you begin

Role required: sn_customerservice_agent

You must log in to your CCaaS account and CSM/FSM Configurable Workspace to receive the callback requests on the CSM Configurable Workspace.

About this task

The callback interaction is either routed in the customer-first or agent-first method by contact center providers to the agent. In the customer-first scenario, the interaction appears like any other voice interaction. In the agent-first scenario, the interaction appears with a callback actions component and callback context card. For more information on the agent-first and customer-first

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modes, see Integrating contact centers with Interaction Controls Component (ICC) for callbacks. The following procedure is applicable for the agent-first scenario.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.

   Note: The AWA inbox card displays the following information for callbacks:
   - Name of the customer
   - Queue to which the callback is assigned
   - Type of callback (ASAP or Scheduled)
   - Reason for callback

2. Perform one of the following in your inbox when you receive a callback interaction request.

Action	Description
Accept	Select this button to accept the callback inter action request. The voice interaction page opens with the Callback Actions component on the top-left corner of the page. For more details on the callback actions component, see Callback ac tions component.
Reject	Select this button to reject the callback inter action request. The callback interaction gets routed to the next available agent.

3. View the Callback context card for the details of the callback who requested a callback. For more information on the Callback context card, see Callback context card.
4. Select the GVC icon on the unified navigation bar to perform call-related actions when you are on other pages.

   You might have to open a knowledge article or case to address a customer request. While on a different page, you need not come back to the interaction page to control the call. Instead, you can use the GVC to control the call.

   You can use the callback actions such as Call number, Close Callback, Retry call, and so on, on the GVC in the same way as you use them on the Callback Actions component. For more information on how to use the callback actions component for callback interactions, see Manage a CCaaS callback request in the Configurable Workspace.

   Note: The Transfer function isn't supported in GVC.

5. Select the **Open interaction** link on GVC to open the callback interaction record.
6. Update the **Reason** and **Notes** appropriately and select **Submit & close** in the Wrap up modal after ending the call.
   After submitting wrap up, CCaas closes the interaction and callback task.
7. Select **Close callback** on the Callback Action component to close the callback.

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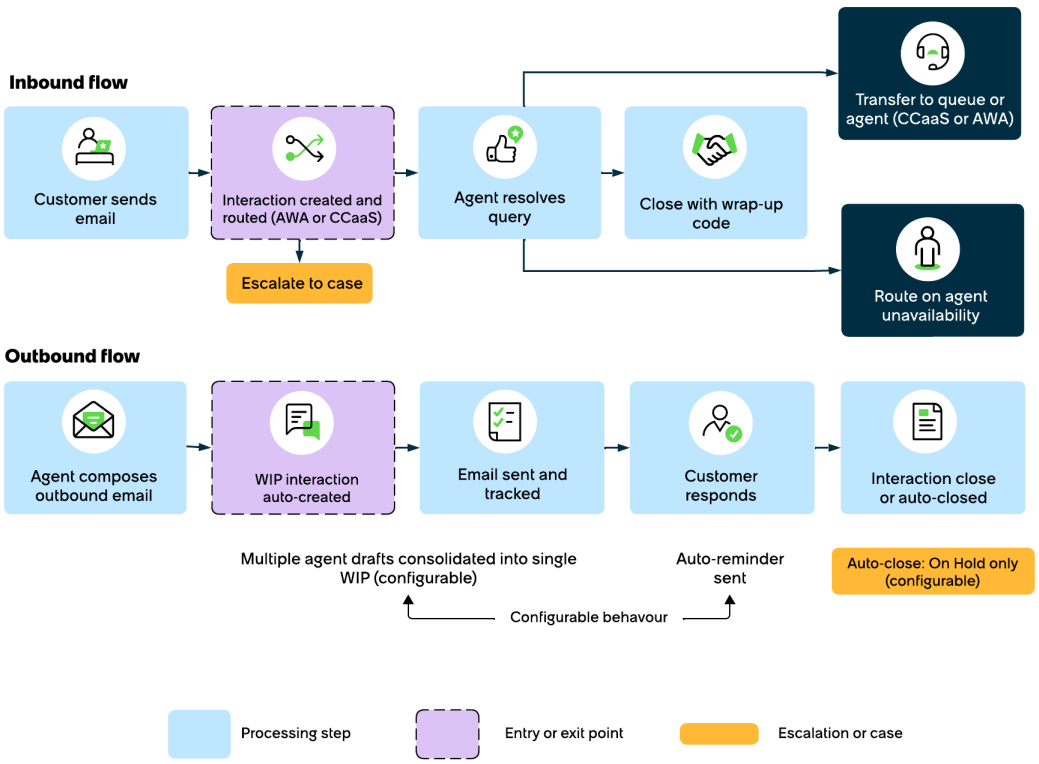
In the automatic dial, the callback gets closed when the timer for closing the callback reaches zero.

8. Close the callback interaction page.

Using Email Interaction for Customer Service Management

Email Interaction for CSM application enables agents to create interactions from customer emails, helping them resolve simple customer queries through these interactions. They can create a case from an interaction when further investigation is needed for resolving the customer query. This process provides clarity of the effort needed for customer query intake and actual investigation needed for query resolution.

Email Interaction for CSM workflow overview



The Email Interaction for CSM application offers several key benefits:

- Streamlines operations by helping to prevent the creation of duplicate or unnecessary cases.
- Provides a consistent experience for agents across channels by modeling emails as an interaction, alongside voice, chat, and messaging channels.
- Clarity of effort needed for customer problem intake, represented by interactions.
- Clarity of effort needed for investigation and resolution, represented by cases.
- Enables agents to initiate outbound email interactions directly from contact or consumer records.

Email interaction routing

Email interactions can be routed through Advanced Work Assignment (AWA) or through an external Contact Center as a Service (CCaaS) solution. The system detects the routing source for each interaction, which determines the available agent actions such as wrap-up and transfer

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capabilities. For AWA-routed interactions, wrap-up codes are saved in the wrap-up segment table. For CCaaS-routed interactions, wrap-up codes are synced to both instance and the CCaaS system, and agents can transfer the interaction to another queue or agent.

Inbound email interactions

When a customer sends an email, the system creates an inbound interaction instead of a case. The interaction is routed to an available agent through Advanced Work Assignment (AWA) or a CCaaS provider. The agent reviews the interaction, responds through the activity stream, and resolves the query directly within the interaction. If the query requires further investigation, the agent creates a case from the interaction while preserving all communication history and context.

Inbound email interactions support the following features:

- Email-to-interaction conversion with automatic agent routing through AWA or CCaaS.
- Activity stream for viewing email threads and agent responses.
- Case creation from an interaction only when deeper investigation is needed.
- Interaction closure with wrap-up codes for reporting and conformance.

Email replies on closed interactions

When a customer replies to an email thread linked to a closed interaction, the system automatically links the reply to the correct open case or interaction. This prevents the creation of a new interaction. This preserves conversation continuity and confirms the assigned agent receives the reply in context. If no open cases or interactions are linked to the closed interaction, the system creates a new interaction for the email reply.

Email replies on closed interactions support the following:

- Automatic routing of customer replies to the correct open case or interaction without agent action.
- AI-based context matching when multiple open cases exist, using keyword matching. Check your entitlements to determine whether you have access to this feature.
- Fallback linking to the most recently opened case when no confident match is found.
- Agent notification through the bell icon when a reply is linked to an open case.
- Support for standard cases and extended case types.

For more information on how the system evaluates and routes replies, see Email reply linking for closed interactions.

Outbound email interactions

Agents can initiate outbound email interactions directly from contact or consumer records in the CRM Workspace. When an agent composes and sends an email from a contact or consumer record, the system automatically creates a Work-In-Progress (WIP) outbound interaction. The system assigns the interaction to the agent.

Outbound email interactions support the following features:

- Automatic WIP interaction creation when an agent opens the email composition window from a contact or consumer record.
- Draft email preservation with linking to the outbound interaction.
- Consolidation of drafts from multiple agents into a single WIP interaction (configurable).

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- Configurable automated reminder emails for customers who haven't responded.
- Automatic closure of inactive outbound interactions in the On Hold state after a configurable period, with the default set to 30 days.
- Automatic association of customer response emails to the same outbound interaction, with agent notification on the **Ongoing** tab.

Multiple agents composing email for the same customer

By default, when multiple agents initiate outbound emails for the same customer, the system consolidates all drafts into a single WIP interaction. The outbound interaction is assigned to the agent who initiates the email. If the agent composes the email but doesn't send it immediately, the draft remains in WIP status. When another agent composes an email to the same contact or consumer, the second email is linked to the same outbound interaction. Ownership is reassigned to the second agent. When the email is sent, the interaction is assigned to the agent who sends it.

This behavior is configurable using the (*sn_eaai_core.create_outbound_interaction_per_agent.target_tables*) system property. When a table is listed in this property, a new outbound interaction is created for each outbound email initiated by different agents for the same customer. For example, if Agent A and Agent B both compose emails to the same contact, each agent gets a separate outbound interaction instead of sharing one. When a table isn't listed, all agent drafts are consolidated into a single WIP interaction.

For more information, see System properties for configuring Email Interaction.

Wrap-up codes for email interactions

When closing an email interaction, agents select an internal wrap-up code to categorize the outcome. Wrap-up codes support both AWA-routed and CCaaS-routed email interactions, improving reporting reliability and conformance tracking.

The following default wrap-up codes are available:

- Issue resolved: Agent resolved the customer query within the interaction.
- Task created: Automatically assigned when a case is created from the interaction.
- Closed due to customer inactivity: Automatically assigned when the system closes an inactive interaction.

AI summarization of email interactions

Agents can generate AI summaries of email interaction threads to get the key context without reading every message. AI summarization of email interactions supports on-demand summary generation when an agent selects **Summarize** on the interaction page.

Note: Check your entitlements to determine whether you have access to AI summarization.

For more information, see AI summarization of email interactions.

Automatic wrap-up code assignment

In the following scenarios, the system assigns a wrap-up code automatically without agent selection:

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Automatic wrap-up code assignment

Scenario	Wrap-up code	Action
Agent creates a case from the interaction	Task created	Interaction is automatically closed. If the interaction is routed through CCaaS, the code is synced to CCaaS.
System closes inactive interaction (no customer response)	Closed due to customer inactivity	A scheduled job checks for On Hold interactions with no customer response and closes them.
Agent doesn't submit a code within the timeout	Issue resolved (default)	The default code is applied automatically after the configured timeout period. The default timeout is 2 minutes.

Transfer email interactions (CCaaS-routed)

For CCaaS-routed email interactions, agents can transfer the interaction to another queue or agent using the Transfer Email action. Only CCaaS-authorized queues and agents appear in the transfer options. When a transfer is initiated, the interaction record is updated in both CCaaS and the instance, and the current agent's ownership and capacity is released.

Related topics

- Omnichannel
- System properties for configuring Email Interaction
- Wrap up email interactions
- Transfer email interactions
- Create outbound email interactions
- Configure wrap-up codes for email interactions
- Associate wrap-up codes with email interactions
- Routing and assigning an email interaction to agents
- Email reply linking for closed interactions
- Email reply linking scenarios for closed interactions
- AI summarization of email interactions

Routing and assigning an email interaction to agents

Route and assign email interactions to the appropriate agents based on predefined rules and criteria.

When agents accept email interactions routed by Advanced Work Assignment (AWA), the interaction state changes from New to Work in progress and it's assigned to the agent.

For information on the configuration required to route and assign email interactions, see Configure Advanced Work Assignment for routing email interactions.

Alternatively, agents can assign the email interactions manually.

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Assign an interaction manually

Manually assign an interaction that is in the New state to yourself or another agent.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice_manager, or sn_customerservice.consumer_agent

About this task

The **Assign to me** button is only visible if the interaction is in the New state and the **Assigned to** field is empty.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. From the Interactions section, select **My Interactions**.
4. Open an interaction.
5. Assign the interaction in one of the following ways.

Option	Description
Assign the interaction to yourself	Select **Assign to me**. The Assigned to field gets populated with the agent's name and the state changes to Work in Progress.
Assign the interaction to another agent	Select an agent in the **Assigned to** field and select **Save**.

Unified routing of email interactions via CCaaS

Leverage a unified routing solution through Contact Center as a Service (CCaaS) to streamline email interactions using consistent routing logic across voice, chat, and other digital channels. This centralized approach eliminates the need for disparate systems, instead routing all interactions through a single, unified engine.

CCaaS routing benefits

CCaaS routing offers the following benefits:

- Unified routing across channels: CCaaS uses a single routing engine to manage channels like email and voice, making customer interactions easier to handle. This unified system provides a smooth omnichannel experience for agents and customers.
- Reduced configuration and administrative effort: CCaaS unified routing streamlines operations by automating interaction assignments, minimizing the need for complex setup and ongoing management, and reducing manual workload.

Managing email interactions on hold and rerouting

Agents can place email interactions on hold while they wait for customer responses. When an interaction is placed on hold, CCaaS is notified of this status change, which enables the system to reassign the agent’s capacity to other tasks.

When a customer responds to the On Hold email, the interaction status is automatically changed to Work in progress. At this point, if the agent to whom the interaction is assigned isn't available, the email interaction can be optionally rerouted to the next available agent. This feature can be enabled by setting the system property *sn_eaai_csm.email.reroute.enabled* to

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true. By default, it is set to false. When enabled, the **Assigned to** field is cleared, and an event is triggered in CCaaS, enabling it to redirect the email to an available agent. This process verifies that customer inquiries are addressed promptly, even if the initial agent is no longer available.

Related topics

System properties for configuring Email Interaction

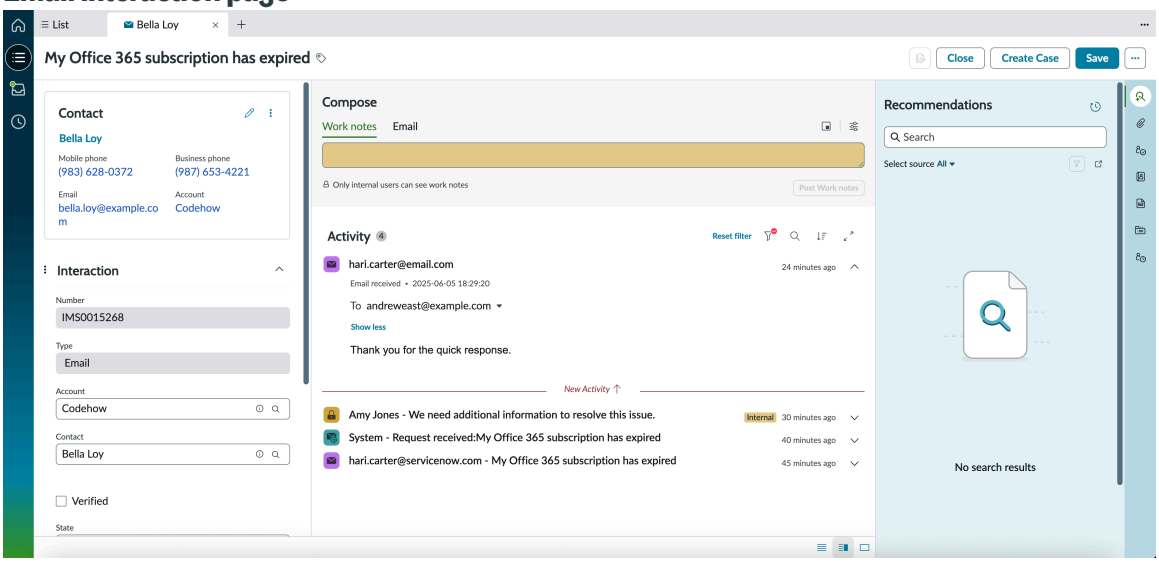
Routing and assigning an email interaction to agents

Using email interaction page

The email interaction page enables agents to view incoming and outgoing emails, attachments, work notes, and other related information in one location. Agents can review and respond to emails and resolve customer inquiries.

The email interaction page consists of various sections.

Email interaction page



The email interaction page includes the following features:

- Manage and send email responses to customers from a single location.
- Use simplified filters , modeless dialog, and compact email header to keep the focus on email communication.
- View the email conversation between the customer and the agent in the **Activity stream** that provides complete context.
- Identify the most recent conversation using annotated new emails, the latest reply, and work notes.
- Generate AI summaries of email interactions on demand. Summaries are also generated on transfer, reducing the need to read the full email thread. Check your entitlements to determine whether you have access to this feature.
- Transfer AWA -routed email interactions to another agent or queue directly from the interaction page.

The email interaction page includes sections such as Contact, Interaction form, Compose, and Activity stream, and the contextual side panel. For more information, see Email interaction sections.

Agents can use the Contact component to do the following:

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- Search for a contact.
- Add a contact.
- Edit and save a linked contact record.
- View a contact.

Engaging with the customer using email interaction

Engaging with customers through email interaction involves verifying customer details as well as creating and updating consumer or contact records. It also includes viewing past emails in the **Activity** stream. Agents can compose email responses using email and response templates, add internal work notes, and track activity history for better context.

Agents are notified of email responses received from customers in the **Ongoing** tab ( ) on the agent workspace. This feature enables agents to view and respond to customer inquiries.

For more information, see View notifications on email response.

Verify a contact, consumer, or guest user

Look up users and manage their information. As an agent, you can find the consumer and contact information from an interaction record, review and verify the information, and then update the interaction record. If the customer is a guest user without an existing consumer or contact record, you can create a record by capturing necessary information.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, or admin

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the contextual side panel, select the Consumer Verify icon ( ) or the Contact Verify icon ( ).

   Note: For more information, see Lookup and verify.

6. Search for a consumer or contact by entering the person's name, phone number, email address, or record number.
7. Select the desired result from the list.
   This action displays information about the selected consumer or contact in a verification card.
8. Confirm the selected consumer or contact by selecting **Verify**#.
   When you perform this action, the following occurs:
   - The#**Account** #and either **Consumer** #or#**Contact**#fields are populated on the interaction record.
   - The#**Verified** #check box is enabled.
9. Select#**Save**#to save the interaction record and refresh the related lists.

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Create a consumer or contact record

Create a consumer or contact from the Lookup and Verify feature in the contextual side panel.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, workspace_admin, or admin

In addition to the preceding roles, a user with any one of the sn_crm_consumer_data_manager, sn_crm_consumer_relationship_data_manager, sn_crm_foundation_data_manager, or sn_crm_foundation_admin roles can create a consumer. A user with any one of the sn_crm_account_data_manager, sn_crm_account_relationship_data_manager, sn_crm_foundation_data_manager or sn_crm_foundation_admin can create a Contact record.

About this task

As an agent, you can use the Lookup and Verify feature to search for consumers and contacts. After verifying a customer's information, you can populate that information on the interaction record.

If you can't find a consumer or contact or if the customer is a guest, you can create a record for that customer using the feature.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the contextual side panel, select the Consumer Verify icon ( ) or the Contact Verify icon ( ).
6. Enter name, phone number, email address, or record number to search for a consumer or contact.
7. If you can't locate the consumer or contact and choose to create a record, select **Create Consumer** or **Create Contact**.
   The system displays the Create Consumer or Create Contact form in the contextual side panel.
8. Add information to the fields on the form and select#**Create**.

Result

The system performs these actions:

- Saves the consumer or contact record.
- Creates and displays the consumer or contact card.
- Adds the information to the interaction record.

Create a customer contact

Use the Contact card on the email interaction page to create a customer contact and add the customer contact into the interaction record.

Before you begin

Role required: sn_customerservice_agent, workspace_admin, or admin

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About this task

Agents can use the contact lookup component to search for contacts. If an agent can't find a contact or if the customer is a guest, the agent can create a record for that customer from the contact lookup component.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. On the Lists section, in the Interactions section, select **My Interactions**.
4. In the My Interactions page, select an email interaction.
5. In the Contact card section, select the Create new icon ( ).
6. On the Contact form, fill in the fields.
   For a description of the field values, see Contact form for Email Interaction for CSM.
7. Select **Save**.

Result

The system performs these actions:

- Saves the contact record.
- Creates and displays the contact card.
- Adds the information to the interaction record.

Using the activity stream in an email interaction

View an email conversation between an agent and a customer in the activity stream of the email interaction. The activity stream enables agents to communicate with customers and make internal notes about the work done on an interaction. The activity stream updates when an email is sent or received, or when a work note is posted.

Agents can perform the email interaction related tasks in the activity stream.

Role required: sn_customerservice_agent or sn_customerservice.consumer_agent.

Actions agents can perform in the activity stream

Task	Description
View emails, work notes, and field changes associated with the email interaction	The activity in the interaction shows emails and work notes by default. **Note:** In the activity stream, each email response displays only the latest message in the conversation. To view entire email thread, enable the Email Show Full Conversation property using UI Builder. For more information, see Customize showing a full conversation in UI Builder.
Add work notes	In the Compose section: **1.** Select Work notes. **2.** Add the information to the text field. **3.** Select **Post Work Notes**.

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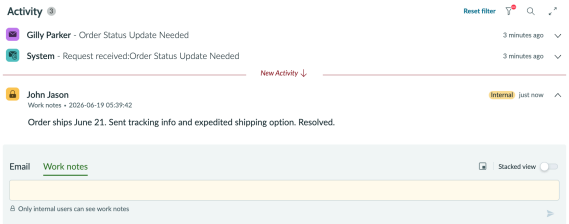
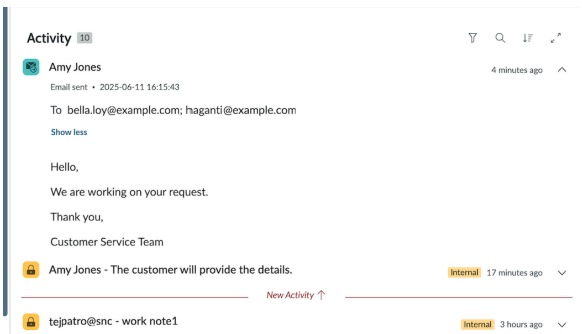
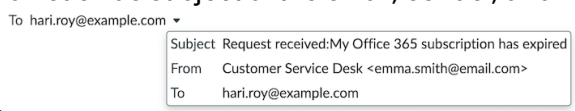
Actions agents can perform in the activity stream (continued)

Task	Description
	The post is added to the activity stream. Alternatively, select the Pop out in modeless window icon ( ) to compose worknote in a separate dialog. (include icon) The latest work note is annotated with the New Activity marker. 
Compose emails	Send emails from the activity stream without leaving the interaction view. In the Compose section: **1.** Select the **Email** tab. An email draft opens. **2.** Compose your email. **3.** Select#**Send Email**. The email is added to the activity stream. Alternatively, select the Pop out in modeless window icon ( ) to compose email in a separate dialog. (include icon) The latest email is annotated with the New Activity marker. 
View email information with compact header	Select the show email details icon ( ) to view the email information such as subject of the email, sender, and receiver. 
Filter posts	Select the filter icon ( ) at the top of the activity stream to display the filter options:

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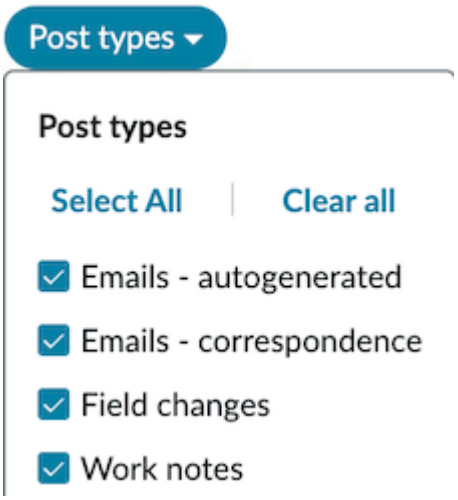
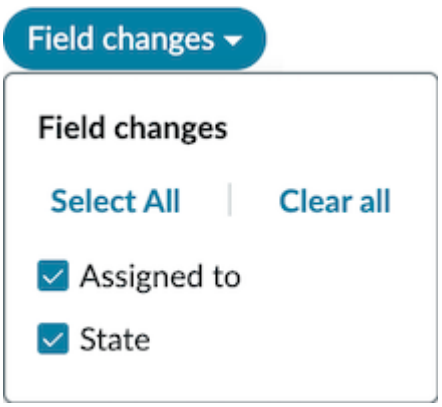
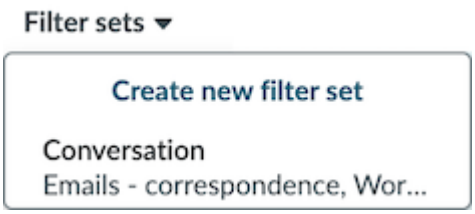
Actions agents can perform in the activity stream (continued)

Task	Description
	• Post types: Select the types of posts to view, such as emails, work notes, or field changes.  • Field changes:#Select specific fields to view information in posts for only those fields.  • Flagged: View posts that have been flagged as important. • Filter sets: Select a filter set to filter the items based on the defined criteria or select **Create Filter** to create a filter. 
Search	Select the search icon ( ) to search for a message.
Sort posts	Select the Sort icon ( ) to sort posts from newest to oldest or oldest to newest.

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Actions agents can perform in the activity stream (continued)

Task	Description
Expand and collapse posts	Select the Expand all activity post icon (↙↗) to view additional details in posts. Select the Collapse all activity post icon (↗↙) to go back to the previous state.

View notifications on email response

View notifications on email responses that are received from the customer in the ongoing email conversation.

Before you begin

Role required: sn_customerservice_agent, or sn_customerservice_manager

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the ongoing tab icon ( ).
   A list of ongoing email interactions is displayed.
3. Select the relevant email interaction.

Result

The interaction record displays the latest email responses.

Close an email interaction

Close the email interaction after the customer accepts the resolution. The email interaction also automatically closes due to customer inactivity.

Note: After an email interaction is closed, sending emails or composing worknotes within that interaction is no longer available.

Close an email interaction after the customer accepts a resolution

Close an email interaction after receiving the customer's confirmation of the resolution.

Before you begin

Role required: sn_customerservice_agent, or sn_customerservice_manager

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. Select **Close**.

Result

The email interaction is closed and marked as Closed Complete.

Close an email interaction due to customer inactivity

An email interaction gets closed automatically when there's no response from the customer within a certain period. By default, the period of inactivity is set to a value of five days.

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If a consumer, contact, or guest user doesn't respond within five days, the email interaction automatically closes. Any subsequent email from the customer creates an email interaction. For more information on configuring the inactivity period property, see System properties for configuring Email Interaction.

When a customer replies on top of a closed email interaction, a new email interaction is created and linked to the closed interaction.

Wrap up email interactions

Close email interactions with a wrap-up code to categorize the interaction outcome. Wrap-up codes support both AWA-routed and CCaaS-routed email interactions.

Before you begin

An administrator must configure internal wrap-up codes. See Wrap up email interactions.

Role required: sn_customerservice_agent

About this task

In the following scenarios, the system assigns a wrap-up code automatically:

- When a case is created from an interaction, the wrap-up code is auto-selected to Task Created and the interaction is closed complete.
- When the wrap-up window times out, the default wrap-up code Issue resolved is auto-saved.
- When the interaction automatically closes because the customer doesn't respond, the wrap-up code is set to Closed due to customer inactivity.

For more information, see Automatic wrap-up code assignment in Using Email Interaction for Customer Service Management.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. Select **Close**.
   The system auto-detects the routing source (AWA or CCaaS) and displays the wrap-up modal with internal wrap-up codes configured by the administrator. The interaction state iss updated to Wrap Up. Select the appropriate wrap-up code from the list.
6. Select **Submit and Close**.

Result

- The email interaction is updated to Closed Complete state.
- For AWA-routed interactions, the selected wrap-up code is saved in the wrap-up segment table.
- For CCaaS-routed interactions, the selected wrap-up code is returned to CCaaS and synced back to the instance.

Compose an email or a work note

Use the Compose section in the email interaction to draft emails, create internal work notes, or draft email responses using response templates.

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Compose an email response

Use the compose section to draft an email response to customers, addressing their inquiry or providing the necessary information.

Before you begin

Role required: sn_customerservice_agent

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the Compose section, select **Email**.
   The **To** and **Subject** fields are auto-populated with the relevant details.
6. **Optional:** Select the Pop out in modeless window icon ( ) to compose your email in a separate dialog.
7. Enter the email content.

   Note: Selecting the More Actions icon ( ) in the Email section displays the email activity history, enabling you to view past emails related to the email interaction. Additionally, you can share links to public articles in the email message.

8. Select **Send Email**.

Result

As an agent, you have successfully drafted a suitable email response to the customer.

Compose emails and work notes using response templates

Use response templates to access predefined messages and compose emails. Agents can copy content from a template and add it to an email to save time.

Before you begin

Role required: sn_customerservice_agent with the sn_templated_snip.template_snippet_reader role

About this task

The contextual side panel provides access to response templates that can help you efficiently compose an email response. Selecting the Response Template icon () shows reusable messages that you can copy and paste into emails.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the contextual side panel, select the Response Template icon ( ).
6. In the Response Templates side panel, search for a template.

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7. Select a template and then select **Copy to clipboard**.
8. Paste the template text into the **Work notes** field or the **Email** field.

Compose a work note for internal use

Compose a work note to document important information for internal reference. The information should be clear, concise, and relevant. This work note isn't shared with customers.

Before you begin

Role required: sn_customerservice_agent

About this task

The work note is visible exclusively to the agent and remains private from the customer.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. In the Compose section, select **Work notes**.
6. **Optional:** Select the Pop out in modeless window icon ( ) to compose worknote in a separate dialog.
7. Enter the relevant content.
8. Select **Post Work notes**.

Result

The work note is posted on the **Activity** stream of the email interaction and is marked with the New Activity marker.

Transfer email interactions

Transfer an email interaction routed by AWA or CCaaS to another agent or queue when the interaction needs to be handled by a different team or individual.

Before you begin

Role required: sn_customerservice_agent

About this task

- For AWA -routed interactions routed by AWA, only available agents and AWA queues appear in the transfer options. When transferring to a queue, AWA routing rules apply to assign the interaction to an eligible agent. When transferring to a specific agent, the interaction is directly assigned.
- For CCaaS-routed interactions, only queues and agents configured in the external queues section appear in the transfer options.
- The full email thread and interaction history are preserved on transfer.
- The transferring agent's capacity is released on transfer. The receiving agent's capacity is blocked on assignment.

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Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction routed by AWA or CCaaS.
5. Select **Transfer email** from the options.
6. In the **Transfer Email** window, select one of the following:
   - To transfer to a queue, select the **Queues** tab, search for the target queue, and select the arrow ( ) icon.
   - To transfer to an agent, select the **Agents** tab, search for the target agent, and select the arrow ( ) icon.

Result

- A message confirms the transfer (for example, `This email has been transferred to Queue name`).
- For interactions routed by AWA, the interaction is assigned to the target agent or routed to the target queue according to AWA routing rules.
- For CCaaS-routed interactions, the interaction record is updated in both CCaaS and the instance.
- The transferring agent's ownership and capacity are released. The receiving agent's capacity is blocked on assignment. Transfer details including source, target, and timestamp are logged in the Work Item table.

Create outbound email interactions

Initiate an outbound email interaction from a contact or consumer record to proactively engage with a customer. The system automatically creates and tracks the interaction.

Before you begin

The Email Interaction for CSM application must be installed and activated.

When multiple agents initiate outbound emails for the same customer, the system consolidates drafts by default. For details on the behavior, see Multiple agents composing for the same customer in Using Email Interaction for Customer Service Management Customer Service Management.

Role required: sn_customerservice_agent

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open a contact or consumer record.
5. Initiate an email using one of the following methods:
   - Select **Compose Email** on the record.
   - Select the email address on the contact or consumer record.

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The email editor opens in a modeless dialog with the To field pre-filled with the contact or consumer email address. The system automatically creates a Work-In-Progress (WIP) outbound interaction and assigns it to the agent.

Note: If you add more than one contact or consumer to the To field, or edit the To field, the interaction remains associated with the original contact or consumer.

6. Compose your email.
7. Select the Send email ( ) icon.

Result

- The email is sent and associated with the outbound interaction.
- The interaction is linked to the contact or consumer record in the related list.
- When the customer responds, the response is associated with the same interaction and you're notified on the **Ongoing** tab.
- If a reminder is configured, the system sends an automatic reminder email to the customer if no response is received within the configured period.
- If the email remains in draft state for more than 30 days, the interaction is automatically closed with a state of Closed Abandoned. The 30-day period resets each time the agent opens the draft or creates a new draft.

Creating a case from an email interaction

Create a case from an inbound email interaction when the customer query requires further investigation. The case and interaction are linked to each other. All communication and case details are easily accessible for more efficient resolutions.

After a case is created from an email interaction, the email interaction is automatically closed.

When a case is created, sending an email to the customer creates an outbound interaction. This outbound email interaction is for reporting purposes only, and no emails are linked to it.

Closing the case also closes the outbound interaction.

Create a case

Create a case from an inbound email interaction to make sure that issues are addressed and routed for resolution.

Before you begin

Role required: sn_customerservice.consumer_agent, or sn_customerservice_manager

About this task

When you create a case from an inbound interaction, the system links the interaction to the case. All future communication related to the case is stored within the case.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. Select **Create case**.

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The system opens a new case form, automatically filling the Contact or Consumer field and setting the channel to Email. The system then populates the Short Description with the email subject.

6. Enter the case details.
7. Select **Save**.

Result

The process generates a case from an email, linking them for future communication. For more information, see Accessing associated cases and interaction emails.

Associate an existing case with an email interaction

Avoid duplicate case creation by associating an existing case with an email interaction.

https://player.vimeo.com/video/1161557435?h=c750bccd07&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

About this task

The interaction must be in a closed complete state before it can be linked to an existing case.

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon ( ).
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. From the top section, select the More Actions icon ( ).
6. Select **Associate Record**.
   The **Create New Interaction Related Record** tab is displayed.
7. Select the case number from the Task drop-down list.
   You can select the search icon ( ) to view additional information about the task.
8. Select **Save**.

Result

The email interaction has been linked to an existing case and displays in the Related Tasks section.

Accessing associated cases and interaction emails

Access the associated case from the email interaction and vice versa. From the email interaction, agents can view the linked case for additional context. While from the case, they can access all related email interactions. This smooth navigation helps agents manage customer issues more effectively.

Access a case from an email interaction

View the linked case to get additional context on the email interaction.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

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Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. In the Interactions section, select **My Interactions**.
4. Open an email interaction.
5. From the contextual side panel, select **Related Lists**.
6. From the Related lists section, select **Related Tasks**.

Result

All cases associated with an email interaction and their details are displayed.

Access an email interaction from a case

View the linked email interaction to access all information related to the case.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice_manager

Procedure

1. Navigate to **All** > **CSM/FSM Configurable Workspace**.
2. Select the List icon.
3. From the Cases section, select **My Cases**.
4. Open a case.
5. Select the **Interactions** tab.

Result

All email interactions associated with the case and their details are shown.

Email reply linking for closed interactions

When a customer replies to an email associated with a closed interaction, Email Interaction automatically links the reply to the correct open case or interaction without creating a duplicate interaction or requiring agent intervention.

The closed interaction is not reopened as part of this process.

How the system processes the reply

When the system receives an inbound email that references a closed interaction, it evaluates related records in the following order:

1. The system checks for open interactions related to the closed interaction. If exactly one open interaction exists, the reply is linked to it.
2. If no open interaction exists, the system checks for open cases. If exactly one open case is associated with the closed interaction, the reply is linked to that case.
3. If multiple open cases are associated with the closed interaction, the system uses an AI skill to match the reply to the most relevant case. The skill evaluates each case's short description, comments, and the latest five emails, and applies keyword matching. The skill returns the case with the highest confidence score.

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4. If the highest confidence score is 85% or above, the reply is linked to the matched case. If all scores are below 85%, or the AI skill is not active, the reply is linked to the most recently opened case.

   Note: The Contextual Email Matching skill must be activated for AI-based case matching to work. For activation steps, see Activate contextual email matching for CSM.

5. If no open interactions or cases exist, the system creates an interaction and stores a reference to the original closed interaction.

Case types

The routing logic applies to both standard cases and extended case types. All records in the case table hierarchy that are associated with the closed interaction are included in the evaluation.

Email threading

The system uses watermarks and reference IDs embedded in outbound email threads to identify whether an inbound email is a reply to an existing thread. Only emails identified as replies to an existing thread follow this routing logic.

Agent notification

When a reply is linked to an open case, the agent assigned to that case receives a notification via the bell icon in the CRM Workspace. Notifications are sent regardless of which valid open state the case is in. The reply appears in the case activity stream.

For a complete list of routing scenarios and system actions, see Email reply linking scenarios for closed interactions.

Related topics

Email reply linking scenarios for closed interactions

Using Email Interaction for Customer Service Management

System properties for configuring Email Interaction

Summarize an email interaction

Use ServiceNow Otto to generate an AI summary of an email interaction. Agents get a concise overview of customer issues, conversation context, and action items.

Before you begin

Verify that ServiceNow Otto for Customer Service Management is installed and the AI summarization skill is activated. For activation steps, see Activate email interaction summarization for CSM.

Role required: sn_customerservice_agent

About this task

Email interactions can contain lengthy conversation threads with multiple participants and complex customer issues. The AI summarization feature analyzes email content and generates structured summaries that highlight key information and action items, helping agents quickly understand the interaction context.

Note: AI-generated summaries may not capture all nuances of human communication. Agents must review summaries for accuracy.

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Interaction states and summary display

The Summarize this interaction section displays differently depending on the interaction state:

New

The Summarize this interaction section appears with a **Summarize** button. No summary has been generated yet. Select **Summarize** to generate the summary.

Work in Progress

If a summary has already been generated, the Interaction Summary card displays automatically showing components such as Issue, Key Actions Taken, and Next Steps. Select the refresh icon to regenerate the summary if the email thread has changed.

Closed or Closed Complete

The Interaction Summary card displays the last generated summary. The Check AI-generated content for accuracy message appears below the summary with thumbs-up and thumbs-down feedback controls.

Procedure

1. Navigate to **Customer Service** > **Email Interactions** > **All**.
2. Open the email interaction record that you want to summarize.
3. Select **Summarize**.
   The AI-generated summary appears, displaying key conversation points, customer issues, and action items.
4. **Optional:** Review the summary and complete any of the following actions.
   - **View AI disclaimer information:** Select the information icon next to **Email interaction summarized by** *`ServiceNow Otto`* to view the disclaimer.
   - **Expand or collapse the summary:** Select **View less** to partially collapse the summary or **View more** to expand it.
   - **Copy the summary:** Select the copy icon to copy the summary content to your clipboard.
   - **Provide feedback:** Select the helpful icon for positive feedback or the not helpful icon if the summary was not useful.
   - **Regenerate the summary:** Select the refresh icon to regenerate the summary if email interaction data has changed since the original summary was created.

Result

The AI summary provides a structured overview of the email interaction, including customer issues, key conversation points, action items, and resolution status. This helps agents respond more efficiently.

What to do next

The summary reflects interaction data at the time of generation. As the email interaction progresses with new messages or updates, regenerate the summary to capture the latest information.

Using the Customer Service Portal

Search for information about a question or an issue, or request assistance from a customer service agent.

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Your Customer Service Management Service Portal activity usually begins on the homepage. Organizations usually customize their landing pages, and logged-in users often see different information than users who are not logged in.

Note: If any active outages exist for your install base, they are displayed on the homepage.

Note: A new customer service portal experience is available on the business portal. For details, see Using the Business Portal.

From the Customer Service Portal homepage, you can access and use the following features:

Customer Service Portal homepage for logged-in users

UI component	Description
Knowledge	Clicking **Knowledge** on the header or the main page takes you to the Knowledge homepage. You can search the knowledge base or view a list of top-rated or most viewed knowledge base articles.
Requests	Displays all your requests. You can also request items and services from the catalog.
My Lists	Lists all your cases.
Case	Provides access to all cases and quick links to create a product or order case.
Support	Navigate to appointments, contacts, work orders, install base, and other quick links. The list view of the Install Base items provide details related to customers like account and contact.
Notification	Displays notifications sent for resolved cases, cases awaiting information, publications, and approvals.
Tours	View a tour for additional guidance on how the Customer Service Management application works. Your administrator determines whether tours appear on pages.
Live Chat	Click **Live Chat** to chat with a virtual agent or a customer service agent.
Callback request	Request a callback when the wait time to reach agents is long or agents are unavailable.
Profile menu	Click your profile photo to either view your profile or log out.
Search	Enables you to search. Either enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Ask the Community	Provides access to the Community homepage where you can ask questions and get answers fast, connect with people who share similar expertise, and join forums and participate in discussions.
Get help	Click **Get help** to make a request or report a problem by opening a case.
Request something	Request items and services from the catalog.
Most viewed articles	View a list of the most viewed articles.

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Customer Service Portal homepage for logged-in users (continued)

UI component	Description
Featured articles	View featured Community content.
Most useful articles	View the most useful knowledge articles based on the usage count of the articles.
The following components are available if you have installed the Communities application:	
Recent solved discussion	View a list of recently solved discussions.
Recent community blog	View a list of recently published community blogs.
Community featured content	View a list of featured community content.

Note: You can view the metadata for each entry in the widgets, such as the number of views, number of days from the time the article or feature was published, and rating for the article.

Related topics

Customer contact self-registration

Log in to the Customer Service Portal for the first time

Manage contacts from the customer portal

Create and update customer contacts, assign roles to contacts, and enable or disable contact logins from the customer portal.

Related topics

Manage customer registration requests

Create a customer contact

Create a customer contact

Use the **Create Contact** catalog item to create a contact from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task

By selecting the **Create Contact** catalog item, you can add the details for a contact and create the contact record. After saving the record, you can perform the following actions depending on your role.

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- Users with the sn_customerservice.customer_admin or sn_customerservice.partner_admin can update the contact's user ID and enable or disable notifications.
- Users with the admin role can set a password for the contact and require the contact to reset their password.

Note: These actions are available while you are creating the contact record.

Procedure

1. Click **Requests** > **Request Something** in the portal header.
2. In the Categories list, click **Services** and then click the **Create Contact** catalog item to display the Create Contact form.
3. Fill in the fields on the Create Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Account	The customer's account.
Email	The customer's email address.
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.

4. Click **Submit**.
   The system creates the contact and updates the Contact form.
5. **Optional:** Update the information in the following fields.

Additional Contact fields

Field	Description
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow this format: *`firstname.lastname`*

6. **Optional:** With the admin role, you can update password information for the contact.

Contact password information

Field	Description
Password	Set a password for the contact.

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Field	Description
Password needs reset	Requires the contact to reset their password when they log in to the portal.

7. Click **Save** to update the record.

Related topics

Update contact information for a user

Enable or disable the login for a contact

Update contact information for a user

Update the contact information for a user from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Select **Support** > **Contacts** in the portal header.
2. Select a contact from the Contacts list.
3. Make the desired changes to the fields on the Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Time zone	The time zone for this customer's location.
Account	The customer's account.
Email	The customer's email address
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow the format *`firstname.lastname`*.

4. Select **Save**.

Related topics

Create a customer contact

Assign a user role to a contact

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Enable or disable the login for a contact

Enable or disable the login for a contact from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Select **Support** > **Contacts** in the portal header.
2. Select a contact from the Contacts list.
3. In the Actions list, select one of the following links.

Choice	Description
Disable login	Disables the login for this contact. When the login is disabled, the contact can't access the customer portal. This link is displayed if the login is enabled.
Enable login	Enables the login for this contact. This link is displayed if the login is disabled.

Related topics

Create a customer contact

Assign a user role to a contact

Assign a user role to a contact

Assign one or more user roles to a contact from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task

Use the Edit Role pop-up window to manage the roles for a contact. Contacts must have at least one assigned user role. If there are no roles in the **Selected** column on the pop-up window, you cannot update the record.

Note: The roles available in the Edit Role pop-up window are configured using the **sn_customerservice.contact_role_assignment** property.

Procedure

1. Select **Support** > **Contacts** in the portal header.
2. Select a contact from the Contacts list.
3. In the Actions list, select the **Edit Roles** link.
4. In the Edit Role pop-up window, select a role in the **Available** column and move it to the **Selected** column.
5. Select **Update** on the Edit Role pop-up window.

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Note: If there are no roles in the **Selected** column, the system displays an error message and the column resets to display the originally assigned roles.

6. Select **Save** on the Contact form.

Related topics

Roles installed with Customer Service Management

Manage customer registration requests

Users with the customer administrator role can approve or reject registration requests that customers submit from the Customer Service Portal.

Related topics

Approve a registration request with a valid registration code

Reject a registration request

Approve a registration request with a valid registration code

Approve a registration request from a user that was submitted from the Customer Service Portal with a valid registration code.

Before you begin
Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to the customer portal.
2. Select **Approvals**.
   The Approvals list displays registration requests with these states: **Requested** and **No Longer Required**.
3. Select a request in the Approvals list with a state of **Requested**.
4. If desired, add any **Comments** to this request.
5. Select **Approve**.
   A user account is created and an email is sent to the contact's email address with a user ID and temporary password. The user is also assigned these roles: sn_esm_user and snc_external.

Related topics

Reject a registration request

Manage customer registration requests

Approve a registration request with an invalid registration code

Approve a registration request from a user that was submitted from the Customer Service Portal with an invalid registration code.

Before you begin
Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to **All** > **Customer Service** > **Administration** > **Pending Registrations Requests**.
2. Select a registration request with a state of **Pending**.

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3. Select an **Account** for the requester.
4. Select **Update**.
   The registration request is sent to the customer administrator of the assigned account.

Related topics

Approve a registration request with a valid registration code

Reject a registration request

Reject a registration request

Reject a registration request from a user that was submitted from the Customer Service Portal.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to the customer portal.
2. Select **My Approvals**.
3. Select a request in the Approvals list with a state of **Requested**.
4. Select **Reject**.
   An email regarding the rejection is sent to the requestor's email address.

Related topics

Approve a registration request with a valid registration code

Manage customer registration requests

Assign a contact to an asset from the customer portal

Users with the customer administrator role can assign a contact to an asset from the customer portal.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Log in to the customer portal.
2. Select **Support** > **Assets** from the portal header menu.
3. Select the desired asset.
4. Select **Asset Contacts** in Related Lists.
5. Select **New** in Asset Contacts.
   This displays a new Asset Contact form. The **Asset** field displays the selected asset and is read-only.
6. Select a **Contact**.
   The contacts available for selection are the contacts from the asset's account.
7. Select **Save**.
   The contact is added to the **Asset Contacts** related list.

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Related topics

View asset information from the Customer Service Portal

Create a customer contact

Search for information on customer service portal

Use the search feature on the customer portal to find information about a question or an issue.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

The portal has a search feature that you can use to search for information across several repositories. Enter a search term in the **Search** field and then select **Search** to display a list of related articles.

Procedure

1. Enter a search term into the **Search** field.
2. Select **Search**.
   A list of articles related to the search term is displayed.
3. Select a link to view an article.

Related topics

Search the knowledge base

Search the customer service community

Search the knowledge base

Use the customer portal to search the knowledge base or view a list of popular knowledge base articles.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

The customer service portal includes a link to the knowledge base that you can use to search for information, read and rate articles, and submit feedback. Under this link, the portal displays a list of popular knowledge base articles. If the information that you need is not included in this list, you can search the knowledge base for the desired information.

Procedure

1. Navigate to the customer service portal.
2. Select **Knowledge**.
   The knowledge page displays a separate category for each of the products purchased by this customer. It also displays lists of articles by:
   - Featured content
   - Most useful
   - Most viewed
3. Do one of the following,

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Option	Description
Click a product to display more specific information	Displays a list of categories on the left and articles on the right. Click a category to drill down even further.
Click a link from one of the lists	Displays the article.
Type a topic in the Search field and press the Enter key	Displays a list of related articles. Click a link to display the desired article.

Related topics

Search for information on customer service portal

Search the customer service community

Search the customer service community

Use the customer service portal to search the community site or view a list of recent discussion topics.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the customer service portal.
2. Select **Ask the Community**.
   This brings up the Ask a Question page.
3. Enter a question in the **Title** field.
4. Select a knowledge base in the **Knowledge Base** field.
5. If desired, select a category in the **Category** field.
6. If desired, add one or more tags to your question in the **Tags** field.
7. Select **Post Question**.
   The question appears on the search results page under the **Questions** category.

Related topics

Search the knowledge base

Search for information on customer service portal

Deflect cases with knowledge and community content

Enable customers to search for information from the knowledge base and community and find solutions to their issues.

Before you begin

Role required: sn_customerservice_customer or sn_customerservice_consumer

About this task

The Service Portal Case form displays contextual search results based on text entered in the Subject field. These search results provide targeted solutions to customers. Customers can search for information that is related to a case when opening a case. If the search results in any related content, the customer can preview the content.

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Note: By default, search results include knowledge articles, solved community questions and blogs, and pinned articles.

Procedure

1. Navigate to the Customer Service Management Service Portal and then **All** > **Support** > **New Cases**.
2. Select **Product Case** or **Order Case**.
3. Start typing in the **Subject** field.

   If there are any search results that match, they are displayed in the **Related Search Results** widget.

   Note: If embedded search has been enabled, the results are displayed inline in the Case form in a **Knowledge results** section and are read-only.

4. Perform one of the following actions.
   - Select one of the content links in the **Related Search Results** widget to enter the content directly.
   - Select one of the content links in the embedded **Knowledge results** section to open the content inline as read-only.
5. **Optional:** Select **This helped** to mark the content as helpful for resolving the associated case.
6. Select **Submit**.

Related topics

Search the knowledge base

Search the customer service community

View asset information from the Customer Service Portal

View a list of assets for the current user's account.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Select **Support** > **Assets** in the portal header.
   This displays a list of assets that belong to the current user's account, including the name and serial number of the asset and the product model category and account to which it belongs.
2. Select one of the following to view more information.

Option	Description
Display name	Displays the asset information.
Account	Displays the account information.
Model category	Displays the product model information for this asset.

3. Select the Back button to return to the list of assets.

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Related topics

View product information from the Customer Service Portal

Create a product case from the Customer Service Portal

View or update customer contact information

View or update your contact information from the customer portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the customer portal.
2. Select **support** > **Contacts**.
3. Select the required contact.
4. Make any desired changes to the fields on the Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Time zone	The time zone for this customer's location.
Account	The customer's account.
Email	The customer's email address
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow the format *`firstname.lastname`*.

5. Select **Save**.

Related topics

Change your password directly from the Customer Service Portal

Set email notification preferences

Customer notification preferences

Customers can set preferences for email notifications.

Email notification preferences are set to control email notifications that are sent to the customer when an agent performs one of the following case activities:

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- Opens a case for a customer
- Comments on a customer's case
- Provides a resolution for a customer's case
- Closes a customer's case

Related topics

Set email notification preferences

Set email notification preferences

Customers can set preferences for email notifications that are sent when customer service agents perform different actions on cases.

Before you begin

Ensure that you have received at least one email for the case to set the email notification preferences.

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the customer service portal.
2. Select your user name or photo in the portal header to display your user profile information.
3. Select the **Notification Preferences** related link to display the Notification Preferences form.

   Note: The **Notification Preferences** link is available only after receiving the first email for the case.

4. Enable or disable the following email notifications for your primary email address.
   The notifications are available based on the actions performed by customer service agents on the case.
   - Case closed for customer
   - Case commented for customer
   - Case escalated for customer
   - Case assigned to a new group
   - Case opened for customer
   - Case resolved for customer

Related topics

Customer notification preferences

View or update customer contact information

Change your password directly from the Customer Service Portal

Change your password directly from the Customer Service Portal. Users with the required roles can change their passwords from the Customer Service Portal.

Before you begin

Role required: none

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About this task

Users with the required roles can change their passwords from the Customer Service Portal.

Procedure

1. Go to the Customer Service Portal page by accessing your instance URL and adding a /csm suffix.
   For example, https://example.com/csm.
2. Select your user name in the portal header.
3. Select **Profile** to display the user profile information.
4. Select **Change Password** under **Security**.
5. On the form, fill in the fields.

Change Password form

Field	Description
Current Password	The current password. This field is automatically filled in.
New Password	The new password, which must meet the following requirements: ○ Be a minimum of eight characters long ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	The new password.

6. Select **Change**.

Related topics

Request a password reset

Customer contact self-registration

The self-registration feature enables new customer contacts to submit registration requests through the customer portal.

A customer contact can submit a registration request using a valid registration code. The request is then sent to the customer administrator of that account for approval. For details, see Approve a change request, or registration request.

If an account has multiple customer administrators, they all receive the registration request, but only one approval is necessary.

The request is either accepted or rejected. If accepted, a new account is created, and the customer contact gets an email with a user ID and a temporary password. When logging in to the portal for the first time, the customer contact needs to change the temporary password. If rejected, the customer contact gets an email notification.

Note: If a request is submitted with an incorrect registration code, a notification message appears `Invalid Registration Code`.

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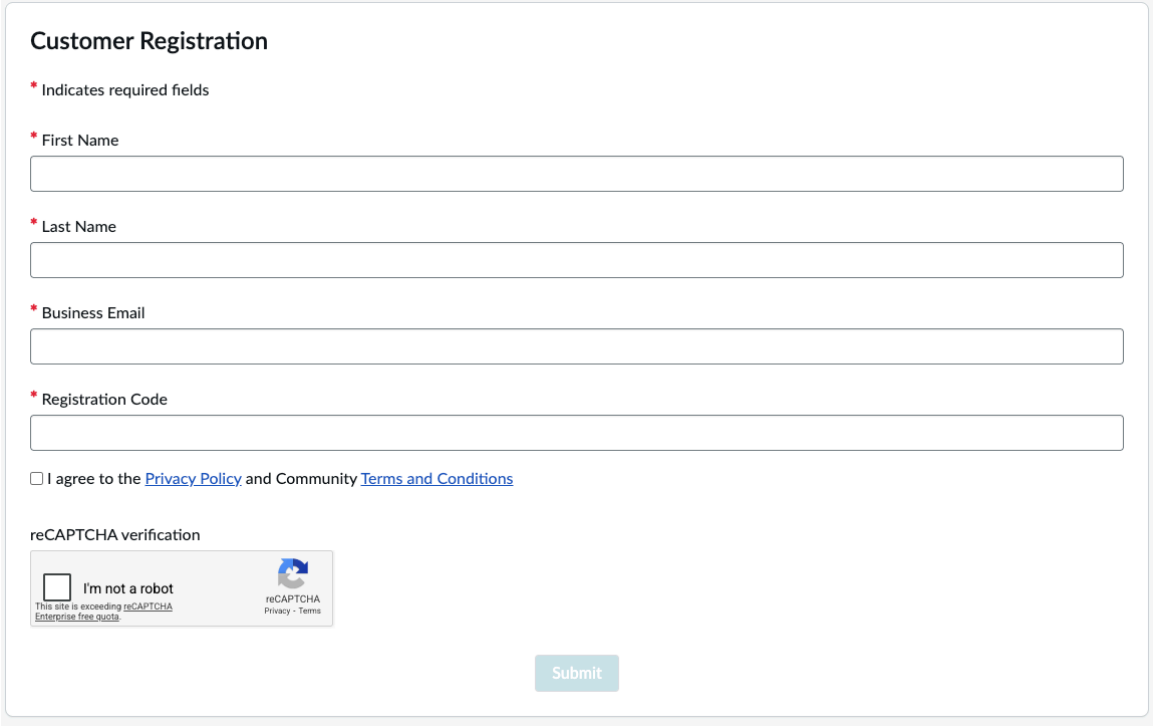
Customer contact self-registration form



The administrator creates a unique registration code for each account and stores it in the **Registration Code** field on the Account form. After the code is created, customer administrators can distribute the code to customers as needed.

Related topics

Example: The default self-service Password Reset process

Submit a self-registration request

Submit a registration request from the Customer Service Portal.

Before you begin

Role required: none

Procedure

1. Navigate to the customer portal login page.
2. Request a login by selecting **Register** from the portal header.
3. Fill in your **First Name**, **Last Name**, **Business Email**, and **Registration Code**.
4. Enable the check box to agree to the privacy policy and to the community terms and conditions.
   Select the links to access more information about these policies.
5. Enable the Security Code check box, complete the CAPTCHA validation, and select **Verify**.
   The Customer Service application uses the Google re-CAPTCHA service.
6. Select **Submit**.
   You’re returned to the portal login page.

   If you entered a valid registration code, you see this message: “Your request has been submitted and is pending review. You receive an email when your request is processed".

   If the code was incorrect, you see this message: “Incorrect Registration Code".

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Related topics

Customer contact self-registration

Log in to the Customer Service Portal for the first time

Request a password reset

If you forget your password, you can request a new password from the customer portal login screen.

Before you begin

Role required: none

Procedure

1. Navigate to the customer portal login page.
2. Select the **reset your password here** link.
3. Enter your **User name** and **Email address**.
4. Select **Reset Password**.
5. Create a new password before continuing.
6. Enter the new password in the **Password** field.
7. Enter the new password again in the **Validate Password** field.
8. Select **Submit**.

Related topics

Change your password directly from the Customer Service Portal

Log in to the Customer Service Portal for the first time

Log in to the Customer Service Portal for the first time

After a registration request is approved, the customer contact receives an email with a user ID and temporary password. When logging in for the first time, the contact is asked to change the password.

Before you begin

Role required: none

Procedure

1. Navigate to the Customer Service Portal login page.
2. Enter your user ID in the **User name**.
3. Enter your temporary password in the **Password** field.
4. Select **Login**.
   You're prompted to change your password.
5. Enter your temporary password in the **Current Password** field.
6. Enter your new password in the **New Password** field.
7. Reenter your new password in the **Confirm New Password** field.
8. Select **Submit**.

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Related topics

Submit a self-registration request

Request a password reset

View product information from the Customer Service Portal

View a list of products to track the products or services sold to your account and manage your services using service catalogs.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

You can view a list of products or services that have been sold to your account. You can also view any cases created on the product and all active contracts and entitlements for the product.

Note: When the Customer Data Models for B2B2C plugin installed, contacts are able to access the list of sold products belonging to account consumers.

An entitlement is active if:

- Its end date is not in the past or it has no end date.
- The contract it is linked to is also active.

A contract is active if:

- Its state is set to active
- It is linked to a product with an active entitlement.

You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

If product catalog items have been set up in your instance, you can use the **Service Catalogs** widget to view context-sensitive service catalogs based on the services you are subscribed to. Extend your services using service catalogs and request additional items on the services you have subscribed to.

Procedure

1. Navigate to the Customer Service homepage.
2. Select **Support** > **Products** in the header menu.
   The system displays a list of products or services sold to your account.
3. Select a product to view the details and any cases created on the product in the last 30 days.
4. View all active contracts and entitlements for the sold product.
5. **Optional:** You can also create a case directly from the product details.
6. **Optional:** View all catalog items associated to sold products and request additional services, as required.

Related topics

View asset information from the Customer Service Portal

Create a product case from the Customer Service Portal

Create a product case from the Customer Service Portal

Create a case about a question or issue on a product from the Customer Service Portal.

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Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin, sn_acct_consumer.consumer

Procedure

1. Go to the Customer Service Portal by accessing your instance URL and adding a /csm suffix.
2. Right-click in the form header and choose **Case** > **Create Product Case**.
3. On the form, fill in the fields.

Note: Depending on your role, you might not see the **Account** and **Contact** fields.

Create Case form

Field	Description
Account	The account for which the case is being created.
Contact	The name of the customer contact for this case.
Consumer	The name of the consumer for this case. **Note:** This field is active only when the Customer Data Models for B2B2C plugin is installed. Once Account is selected, only consumers belonging to the account are displayed.
Asset	The asset tag number or the serial number of the asset associated with this case.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field, this field is auto-populated if the associated product information is available in the asset record. A product may be associated with multiple assets.
Priority	The available assigned priorities are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low (default)
Subject	A brief description of the customer question, issue, or problem. **Note:** When you start entering the subject, the application searches for relevant content in the knowledge bases configured for the portal. the results are displayed in the **Related Content** list.
Description	A detailed description of the customer question, issue, or problem.

Note: Currently, the **Save as Draft** option is not optimized for Customer Service Management portals and, it is inactive by default.

4. Select **Submit**.

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Result

The case is created, assigned a case number, and added to the creator's case list. To view this list, select the **My Lists** tab on the Customer Service Portal header and select **All Cases** in the left pane.

Related topics

View or modify a case from the Customer Service Portal

Chat with an agent from the Customer Service Portal

Chat with an agent from the Customer Service Portal

Chat with a virtual agent or a customer service agent from the Customer Service Portal to resolve issues quickly.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

Procedure

1. Select the Chat icon ( ) in the Customer Service Portal to start a conversation.
   A virtual agent or a customer service agent responds.
2. **Optional:** To talk to a person instead of a virtual agent, select and then **Contact Support**.
3. When you're finished with the chat, select **End Conversation**.

What to do next

If the agent creates a new case or links the discussion to an existing case, you can view these cases from the customer portal by selecting **My Cases** and displaying the case list.

Related topics

Get help using virtual agent conversations

Create a product case from the Customer Service Portal

Get help using virtual agent conversations

Predefined Customer Service Virtual Agent chatbot conversations help your customers complete common self-service tasks, such as getting help with a product or checking the status of a case. Use predefined NLU with your virtual agent chatbot topics to enable the chatbot to assess user intent and provide the best response based on the conversation's context.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

If you're an anonymous user not logged in to the application, you can get help by entering keywords for an issue and choose to get transferred to a live agent.

A user with a proxy_contact role can also check the case status for a customer.

About this task

The information exchanged during the conversation flow (user inputs and bot responses) enables the chatbot to fulfill a user request or assist a user in completing a task. If you have a question or an issue with an existing product or order, the virtual agent searches the keyword and displays relevant knowledge articles that can help resolve the issue. If there are no relevant articles, it creates a case.

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ServiceNow NLU enables discovery of the chatbot topics based on either the keywords entered in the chat or the user-intent and matches an entity with the user input. If there's a match, it also makes the entity available to the topic.

Procedure

1. Navigate to the Customer Service Management portal.
2. Select the chat icon ( ).
   You can select **Show Me Everything** to display all available topics or enter keywords to narrow down the results to relevant topics.
3. If you're a logged-in user, enter keywords to get help on a case, an issue, or an order.
   - If an NLU is enabled, it guides you through the right topic based on the utterance.
   - If an NLU isn't enabled, it displays topics based on the match for the entered keywords. You can make a selection from all available topics displayed.

   Note: Contact your administrator to determine whether the topics are NLU-enabled.
4. Use

To	Follow these steps
Check the status of a case	**a.** Initiate checking the case status. ▪ If you're using the virtual agent conversation without en abling NLU, select **Check Case Status**. ▪ If you're using NLU in your virtual agent conversation, enter an utterance to check the status of a case. **Note:** If you provide a case number, you'll be pre sented with the details of the case. **b.** Select a case from the case list that you would like to get help for. **c.** When the case information displays, you can do one of the following: ▪ Add a comment ▪ Attach a picture ▪ Check another case ▪ Contact an agent.
Get help with a product	Enter a keyword for your issue. The chatbot returns a list of re lated knowledge articles to help resolve your issue. If there are no matching articles associated with the description, a case is automatically created with the following information: ○ Case identification number ○ Short description ○ State ○ Priority Take any of the following additional actions:

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To	Follow these steps
	○ Update the product and asset ○ Add a comment ○ Attach a picture ○ Contact an agent
Get help with an order	**a.** Initiate checking the status of your order. ▪ If you're using the virtual agent conversation without en abling NLU, select **Get Help with Order**. ▪ If you're using NLU in your virtual agent conversation, enter an utterance to get help on an order. **Note:** If you provide an order number, you'll be pre sented with the details of the order. **b.** Select an order from the list of your orders that you would like to get help for. **c.** Take any of the following additional actions: ▪ Add a comment ▪ Attach a picture ▪ Contact an agent
Get help	If you're an anonymous user not logged in to the application, enter keywords for your issue. The chatbot returns a list of relat ed knowledge articles that have been made public. If there are no matching articles that would help resolve the issue, you can choose to be transferred to a live agent.
Submit Request	**a.** Initiate submitting your request for one of the catalog items. ▪ If you're using the virtual agent conversation without en abling NLU, select **Show Me Everything** and then select **Submit a request**. ▪ If you're using NLU in your virtual agent conversation, enter an utterance. For example, open a request that identifies an associated NLU intent. **b.** Select the catalog item. The Search Catalog Item topic block searches for the catalog item and displays a link based on your search. For more information about search catalog item, see **Note:** Wherever the topic is opened, the records dis play on the same portal. **c.** Select the link displayed and exit the virtual agent if you don't have any further request.
Create Case	Creates a case from Virtual Agent. You need the following fields to create a case:

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To	Follow these steps
	○ short_description (required) ○ description ○ account_sys_id ○ contact_sys_id ○ consumer_sys_id The values of the fields can be empty. If the account, contact, and consumer fields are empty, the logged-in user details are populated. The topic block returns the variable case_sys_id from the topic block.
Update Case	Updates a case from Virtual agent. You need the following two fields to update a case: ○ case_sys_id (required) - must be a valid case ID. If the ID is valid, then the following four options are displayed: ▪ Add product information is displayed only if enable_product_update is set to true. ▪ Add a comment ▪ Attach an image ▪ Cancel ○ enable_product_update - If set to true, the Add product information option is displayed. It updates the asset and model information. The topic block returns the variable case_sys_id
Log a complaint	Select this option to create a complaint case from Virtual Agent. Provide a brief description of the complaint and review the contextual search results. If the results don't provide an answer, enter the following information to create a case: ○ Complaint type ○ Product or location ○ Category and subcategory (if applicable)(○ Date ○ Complaint details ○ Expected resolution After the case is created, you can add a comment to the case or add attachments. **Note:** This option is available with the Case Playbook for Complaints application.
Request a callback	Request a callback when the wait time to reach agents is long or agents are unavailable.

5. To exit a chat conversation, select **I'm done**.

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Related topics

Customer Service Virtual Agent conversations

Maximizing code reuse with topic blocks

View or modify a case from the Customer Service Portal

View or modify the information in a selected customer service case.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

About this task

Depending on the role of the current user, the Case list displays:

- Cases created by the current user (sn_customerservice.customer)
- Cases related to the current user's account (sn_customerservice.customer_admin)
- Cases related to the current user's account as well as partner accounts (sn_customerservice.partner, sn_customerservice.partner_admin)

Procedure

1. Select **Case** > **All Cases** in the portal header.
   Cases are ordered in the list with the most recently updated at the top.
2. Select the desired case number to open the Case form.
3. Make any necessary changes to the **Additional comments** field.
   All other fields on the form are read-only.
4. Select **Update**.

Related topics

Close a case from the Customer Service Portal

Complete a customer service satisfaction survey

View a publication on the Customer Service Portal

View the details of a publication on the Customer Service Portal and download any attachments.

Before you begin

Role required: sn_customerservice.customer

About this task

The **Publications** link on the customer service portal displays a list of current publications that is sorted by publication number.

Note: After a publication reaches its expiration date, it is automatically removed from the Publications list.

Procedure

1. Navigate to the customer service portal.
2. Select **Support** > **Publications** in the portal header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.

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3. If desired, search the Publications list by entering the search term in the search field at the top of the list.
4. Select a publication name to open.
5. If the publication has attachments, select the attachments to download from the pop-up window.
6. Close the pop-up window.
7. Select the return arrow at the top of the publication to return to the Publications list.

Related topics

View or modify a case from the Customer Service Portal

Complete a customer service satisfaction survey

After accepting a proposed solution for a case, complete a customer service satisfaction survey.

Before you begin

Role required: none

When a customer accepts a proposed solution for a case by selecting **Accept Solution** on the case form, a satisfaction survey is displayed in the portal. The customer has the option of completing or skipping the survey. Either choice returns the customer to the list of cases on the self-service portal.

To complete the survey:

Procedure

1. Answer each of the survey questions.
2. Select **Submit**.

Related topics

Close a case from the Customer Service Portal

Request an item or service from the Customer Service Portal

Browse the catalog and create a request from the Customer or Consumer Service Portals.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer, sn_csm_proxy_cont

About this task

Customers and consumers can make requests from the Customer and Consumer Service Portals. Customer administrators, partners, and case managers can also make requests.

Note: Creating a request from the Customer and Consumer Service Portals requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the system administrator provide external customers with access to request records.

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Procedure

1. Do one of the following to create a request:
   - Select the **Request Something** link on the portal landing page.
   - Select **Requests** > **Request Something** in the portal menu header.
2. Browse the service catalog and select the desired item or service.
   You can also use the Category filters to filter the available items.
3. Fill in any necessary information related to the request.
4. Select **Submit**.
   The system processes the request, creates the request and any other related records, and displays the details in the Related Records widget on the case view page.

Related topics

View the status of a request, change request, or registration request

Approve a change request, or registration request

View case records from the Customer and Consumer Service Portals

View case records such as requests, changes, or problems, from the Customer or Consumer Service Portals.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer

About this task

If a case has one or more related records, a Related Records widget is displayed on the case view page that lists those records.

Procedure

1. Navigate to the Customer or Consumer Service Portal.
2. Select **My Lists** in the portal header and then select a case.
   You can use the **My Lists** filter to narrow the list of records before selecting a case.
3. In the Related Records widget, select a record to view its details.
4. **Optional:** For request records, expand the **Stage** field to display more details about the request process.
5. Select the **X** in the upper corner to close the details window.

Related topics

View or modify a case from the Customer Service Portal

Close a case from the Customer Service Portal

Customers and consumers can close cases from the Customer and Consumer Service Portals.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task

This feature is available for the Customer Service Portal (B2B) for product and order cases and for the Consumer Service Portal (B2C).

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The **Close Case** button is not available for cases in the **Resolved** or **Closed** states.

Procedure

1. Select **Cases** in the portal header to open the Case list.
2. Open the desired case.
3. In the Actions section, select **Close Case**.
4. In the confirmation pop-up window, select **Close Case**.
   When a case is closed from the portal:
   - The case status in the Case details section is updated to **Closed**.

     Note: You cannot add comments after the case is closed. You can only view the previous comments in the activity stream.

   - The case additional comments and resolution notes are updated with **Closed by customer**.
   - The case resolution code is set to **Solved by customer**
   - A message at the top of the portal confirms that the case has been closed.
   - The system displays a customer satisfaction survey.
5. Complete the customer satisfaction survey.
   You can also choose to skip the survey. Either choice returns you to the case list on the portal.

Related topics

View or modify a case from the Customer Service Portal

Complete a customer service satisfaction survey

View install base information from the Customer Service Portal

View a list of install base to track the instances provisioned for your account and which products or services run on them.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

You can view all cases and the service status from the last 30 days as well as all active, past, and planned outages. You can also view any active entitlements for the install base. An entitlement is active when its end date isn't in the past or it has no end date. If it's linked to a contract, the contract must also be active.

Note: When the Customer Data Models for B2B2C plugin installed, contacts are able to access the list of install base items belonging to account consumers.

Note: You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

Procedure

1. Navigate to the Customer Service Portal.
2. Select **Support** > **Install Base** in the header menu.
   The system displays a list of install base items that belong to your account.

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3. Select an install base to view the details, including cases created on the install base in the last 30 days, active entitlements, as well as service status and outage history.
4. **Optional:** You can also create a case directly from the install base details.

Related topics

Create a case for install base from the Customer Service homepage

View asset information from the Customer Service Portal

Create a case for install base from the Customer Service homepage

Create a case about a question or issue on your install base from the Customer Service homepage.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin

About this task

Install base enables you to track which instances have been provisioned for your account and the products and services that run on them.

Procedure

1. Navigate to the Customer Service homepage.
2. Select **Create Case for Install Base**.
3. Fill out the fields on the form, as required.

Create Case form

Field	Description
Product	The sold product you have a question on or issue with.
Install Base	The install base item you have a question on or issue with.
Priority	The assigned priority: ○ 1 — Critical ○ 2 — High ○ 3 — Moderate ○ 4 — Low (default)
Subject	A brief description of the question, issue, or problem.
Description	A more detailed description of the customer question, issue, or problem.

Note: Currently, the **Save as Draft** option is not optimized for Customer Service Management portals and, it is inactive by default.

4. Select **Submit**.
   The case is created, assigned a case number, and added to the user's case list. Select **My Cases** at the top of the customer portal to view the Cases list.

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Related topics

View install base information from the Customer Service Portal

View or modify a case from the Customer Service Portal

Approve a change request, or registration request

Users with the snc_external role can view and approve registration requests and change requests from the Customer Service Portal.

Before you begin

Role required: snc_external

About this task

A registration request or a change request may require approval from another employee within the same organization. For details on registration request, see Customer contact self-registration.

Procedure

1. In the Customer Service Portal header, select **Notification** > **View all notifications**.
2. Select a record in the Approvals section of the Notifications page.
   The system displays a read-only view of the record approval form. For requests that include one or more items, these items appear in a collapsible list at the bottom of the Request form.
3. **Optional:** Select a requested item at the bottom of the Request form to view the details in a pop-up window.
4. Select **Approve**.
   The system makes the following updates:
   - The record status is set to **Approved**.
   - The record status is displayed after the record number in the Related Records widget on the Case form.
   - The record status is added to the Case form.
     - If the record is approved by the customer administrator or if the customer self-approves the request, the change in status is added to the **Additional comments** field.
     - For other approvers, the change in status is added to the **Work notes** field.
   - The approval record is updated in the Approval table.

Related topics

View the status of a request, change request, or registration request

View the status of a request, change request, or registration request

Users with the snc_external role can view the status of requests and change requests from the Customer Service Portal.

Before you begin

Role required: snc_external

Procedure

1. In the Customer Service Portal header, select **My Lists**.
2. In the My Lists filter, select **My Cases**.
3. Select a case in the Cases list.
4. View the record status after the record number in the Related Records widget.

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Related topics

Request an item or service from the Customer Service Portal

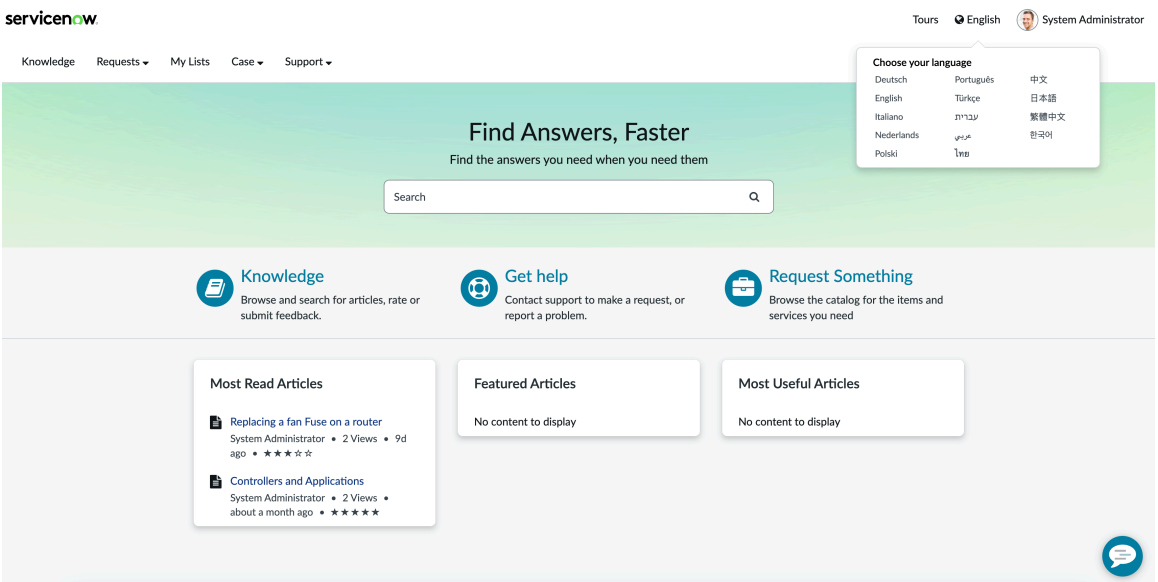
Approve a change request, or registration request

Enable language selection for guest users

The language selector widget enables guest users and unauthenticated users to select, view, and update content in their preferred language.

When a user selects a preferred language, the portal content reloads into the selected language. The widget is enabled by default on the Knowledge portal, the Customer Service Management portal, and the Consumer Service portal. Users can map their languages with regions to view all available languages in the form of a pop-up on the same screen. The widget appears only if a language other than English is active on the instance.

Language selector widget



If languages aren't grouped, users can view all available languages as a full-screen experience.

Note: The full screen mode is available in the mobile view.

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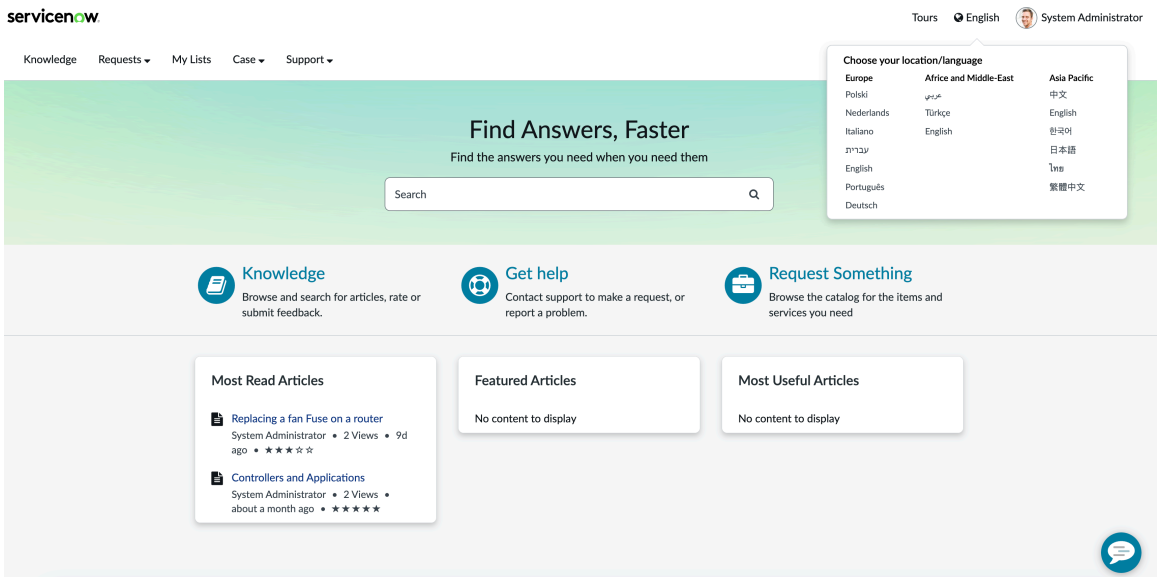
Language selection experience without region grouping



Related topics

- Enable language selector widget
- Service Portal properties
- Create regions for language selection in portals

Using the Business Portal

Search for information about a question or an issue, or request assistance from a customer service agent.

Your Business Portal activity usually begins on the home page. It has configurable widgets to display information.

From the Business Portal home page, you can access and use the following features:

Business Portal home page for logged-in users

UI component	Description
Browse services	Browse through topics and request services.
Frequently asked questions	Get quick answers to common questions.
Resources	Navigate to the Knowledge, Publications, or FAQs pages.
Requests	Submit a request or View submitted requests.
My hub	Manage products and install base items.
My company	Create or manage contacts.
Notification	Displays notifications sent for resolved cases, cases awaiting information, publications, and approvals.

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Business Portal home page for logged-in users (continued)

UI component	Description
Tours	View a tour for additional guidance on how the Customer Service Management application works. Your administrator determines whether tours appear on pages or not.
Live Chat	Chat with a virtual agent or a customer service agent.
Callback request	Request a callback when the wait time to reach agents is long or agents are unavailable.
Profile menu	View your profile or log out.
Search	Enables you to search. Either enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Track your case updates	View updates on your case.
Browse topics	Navigate through topics to explore our services and resources.
Quick links to get you started	View links to knowledge articles,catalogs, and external links.
Most trending articles	View a list of the most viewed articles.
Most popular services	Request items and services from the catalog.
Footer	Contains important links, contact information, and legal details for easy access.

Related topics

Customer contact self-registration on Business Portal

Guest users experience on Business Portal

Manage contacts from Business Portal

Create and update customer contacts, assign roles to contacts, and enable or disable contact login from the business portal.

Related topics

Manage customer registration requests from Business Portal

Create a customer contact

Create a customer contact

Use the **Create Contact** catalog item to create a customer contact from the business portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

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Procedure

1. Navigate to the business portal.
2. Select **My company** > **Create a contact** in the portal header.
3. Fill in the fields on the Create Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Account	The customer's account.
Email	The customer's email address.
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.

4. Select **Submit**.
   The system creates the contact and updates the Contact form.
5. **Optional:** Update the information in the following fields.

Additional Contact fields

Field	Description
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow this format: *`firstname.lastname`*

6. **Optional:** With the admin role, you can update the password information for the contact.

Contact password information

Field	Description
Password	Set a password for the contact.
Password needs reset	Requires the contacts to reset their password when they log in to the portal.

7. Select **Save** to update the record.

Related topics

Update contact information for a user

Enable or disable the login for a contact

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Update contact information for a user

Update the contact information for a user from the business portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

About this task

The business portal lets customer administrators manage contact details for users in their organization. Keeping contact information current lets users receive notifications and can be reached when cases are updated.

Procedure

1. Navigate to the business portal.
2. Select **My company** > **Manage contacts**.
3. Select the desired contact from the Contacts list.
4. Select **Edit details**.
5. Make the desired changes on the Contact form.

Contact form

Field	Description
First name	The customer's first name.
Last name	The customer's last name.
Title	The customer's job title.
Language	The customer's preferred language.
Time zone	The time zone for this customer's location.
Account	The customer's account.
Email	The customer's email address
Business phone	The customer's business phone.
Mobile phone	The customer's mobile phone.
Notification	Enable or disable notifications for this customer.
User ID	A unique identifier for this user. The user ID should follow the format *`firstname.lastname`*.

6. Select **Save**.

Related topics

Create a customer contact

Assign user roles to a contact

Enable or disable the login for a contact

Enable or disable the login for a contact from the business portal to control user access to the portal.

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Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Navigate to the business portal.
2. Select **My company** > **Manage contacts** in the portal header.
3. Select a contact from the Contacts list.
4. In the Actions list, select one of the following links, as required.

Choice	Description
Disable login	Disables the login for this contact. When the login is inactive, the contact can't access the business portal. This link is displayed if the login is enabled.
Enable login	Enables the login for this contact. This link is displayed if the login is disabled.

Related topics

Create a customer contact

Assign user roles to a contact

Assign user roles to a contact

Assign one or more user roles to a contact from the business portal.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner_admin, or admin

Procedure

1. Navigate to the business portal.
2. Select **My company** > **Manage contacts** in the portal header.
3. Select a contact from the Contacts list.
4. In the Actions list, select the **Edit Roles** link.
5. In the Edit Role pop-up window, select a role in the **Available** column and move it to the **Selected** column.
6. Select **Update** on the Edit Role pop-up window.

Note: If there are no roles in the **Selected** column, the system displays an error message and the column resets to display the originally assigned roles.

Related topics

Roles installed with Customer Service Management

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Manage customer registration requests from Business Portal

Users with the customer administrator role can approve or reject registration requests that customers submit from the business portal.

Approve a registration request with a valid registration code on Business Portal

Approve a registration request from a user that was submitted from the business portal with a valid registration code.

Before you begin

Role required: sn_customerservice.customer_admin

Procedure

1. Navigate to the business portal.
2. Select **Notifications** > **View all notifications**.
   The Approvals card displays registration requests.
3. Select the desired request from the Approvals card.
4. Select **Approve**.
   A user account is created and an email is sent to the contact's email address with a user ID and temporary password. The user is also assigned these roles: sn_esm_user and snc_external.

Related topics

Reject a registration request

Manage customer registration requests from Business Portal

Reject a registration request

Reject a registration request from a user that was submitted from Business Portal.

Before you begin

Role required: sn_customerservice.customer_admin

About this task

If a registration request does not meet your organization's requirements or contains invalid information, you can reject it from the Business Portal.

Procedure

1. Navigate to the business portal.
2. Select **Notifications** > **View all notifications**.
   The Approvals card displays registration requests.
3. Select the desired request from the Approvals card.
4. Select **Reject**.
   A rejection email is sent to the requester's email address.

Related topics

Approve a registration request with a valid registration code on Business Portal

Manage customer registration requests from Business Portal

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Customer contact self-registration on Business Portal

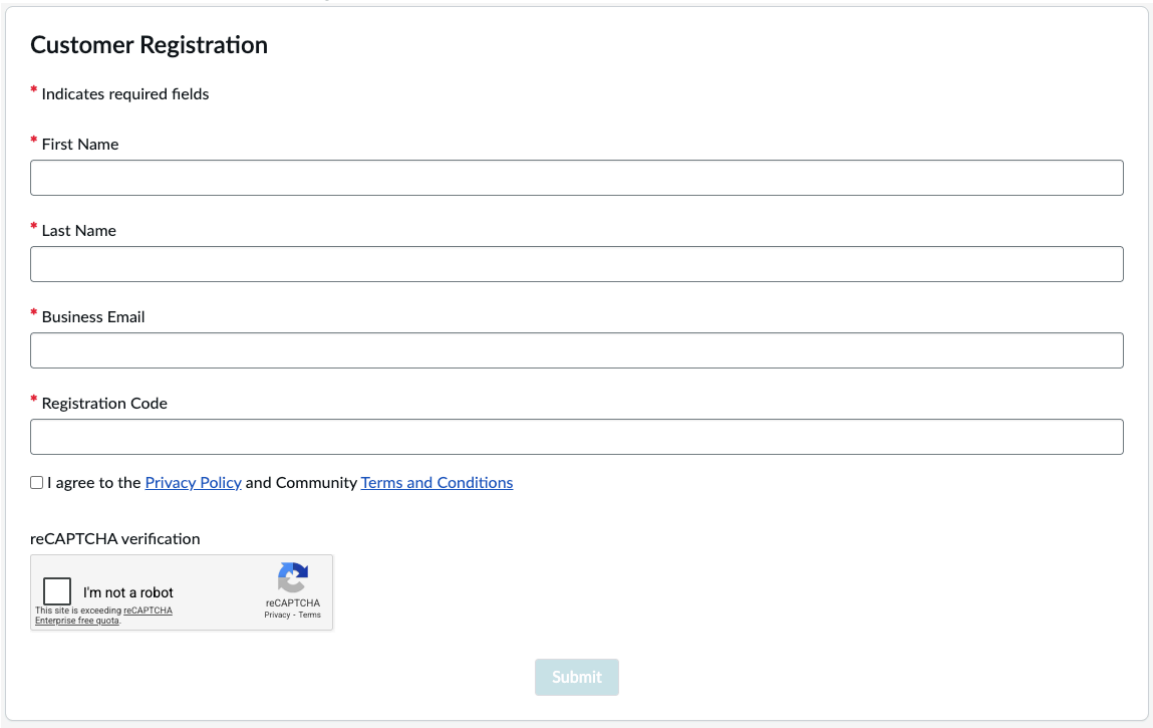
The self-registration feature enables new customer contacts to submit registration requests through the business portal.

A customer contact can submit a registration request using a valid registration code. The request is then sent to the customer administrator of that account for approval. If an account has multiple customer administrators, they all receive the registration request, but only one approval is necessary.

After the request is submitted, it goes through an approval process and is either accepted or rejected. If accepted, a new account is created, and the customer contact gets an email with a user ID and a temporary password. When logging in to the portal for the first time, the customer contact is asked to change the temporary password. If rejected, the customer contact gets an email notification.

Note: If a request is submitted with an incorrect registration code, a notification message appears `Invalid Registration Code`.

Customer contact self-registration form



The administrator creates a unique registration code for each account and stores it in the **Registration Code** field on the Account form. After the code is created, customer administrators can distribute the code to customers as needed.

Related topics

Example: The default self-service Password Reset process

Submit a self-registration request

Submit a registration request from the business portal.

Before you begin

Role required: none

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Procedure

1. Navigate to the business portal.
2. Request a login by selecting **Sign up** from the portal header.
3. On the Customer Registration form, fill in your **First Name**, **Last Name**, **Business Email**, and **Registration Code**.
4. Enable the check box to agree to the privacy policy and to the community terms and conditions.
   Select the links to access more information about these policies.
5. Select the reCAPTCHA verification check box.
   The Customer Service application uses the Google re-CAPTCHA service.
6. Select **Submit**.
   The page redirects you to the portal login page.
   - If you entered a valid registration code, you see the message: “Your request has been submitted and is pending review. You’ll receive an email when your request is processed".
   - If you entered an invalid registration code, you see the message: “Incorrect Registration Code".

Related topics

Customer contact self-registration on Business Portal

Log in to the Business Portal for the first time

Log in to the Business Portal for the first time

Use your user ID and temporary password to login to the business portal for the first time.

Before you begin

Role required: none

About this task

After a customer administrator creates your account or approves your registration request, you receive a temporary password by email. You must log in with that temporary password and then set a permanent password before you can use the Business Portal.

Procedure

1. Navigate to the business portal login page.
2. Enter your user ID in the **User name**.
3. Enter your temporary password in the **Password** field.
4. Select **Login**.
   You’re prompted to change your password.
5. Enter your temporary password in the **Current Password** field.
6. Enter your new password in the **New Password** field.
7. Reenter your new password in the **Confirm New Password** field.
8. Select **Submit**.

Related topics

Submit a self-registration request

Request a password reset

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Request a password reset

If you forget your password, request a new one from the business portal login screen.

Before you begin

Role required: none

Procedure

1. Request reset password email.
   a. Navigate to the business portal.
   b. Select **Log in** in the portal header.
   c. Select the **Forgot Password?** link.
   d. Enter `Username` and complete CAPTCHA verification.
   e. Select **Next**.
   f. Enter your registered email id.
   g. Select **Next**.
   You will receive an email instructions to reset your password.
2. Reset your new password.
   a. Select the **Click here to reset your password** link in the email
   b. On the Reset Password page, enter a new password in the **New Password** and **Retype Password** fields.
   c. Select **Reset Password**.

Result

Your new password is set.

Related topics

Change password on Business Portal

Change password on Business Portal

Change your password directly from the business portal to secure your account.

Before you begin

Role required: none

Procedure

1. Navigate to the business portal.
2. Select your user name in the portal header.
3. Select **Profile** to display the user profile information.
4. Select **Change Password** under Security.
5. On the Change Password pop-up, fill in the fields.

Change Password form

Field	Description
Current Password	The existing password.

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Field	Description
New Password	The new password, which must meet the following requirements: ○ Be a minimum of eight characters long ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	The new password.

6. Select **Change**.

Related topics

Request a password reset

Customer notification preferences

Customers can set preferences for email notifications.

Email notification preferences are set to control email notifications that are sent to the customer when an agent performs one of the following case activities:

- Opens a case for a customer
- Comments on a customer's case
- Provides a resolution for a customer's case
- Closes a customer's case

Set email notification preferences

Customize email notifications to stay informed about specific actions taken by customer service agents on cases, based on your preferences.

Before you begin

Make sure that you have received an email for the case to set the email notification preferences.

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

Procedure

1. Navigate to the business portal.
2. Select your user name or photo in the portal header and select **Profile** to display your user profile information.
3. Select the **Notification Preferences** link under Actions to display the Notification Preferences pop up.

   Note: The **Notification Preferences** link is available only after receiving the first email for the case.

4. Enable or disable the following email notifications for your primary email address.
   The notifications are available based on the actions performed by customer service agents on the case.
   - Case closed for customer
   - Case commented for customer

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- Case escalated for customer
- Case assigned to a new group
- Case opened for customer
- Case resolved for customer

Related topics

Customer notification preferences

Approve or change registration requests from the Business Portal

Users with the snc_external role can view and approve requests and change requests from the business portal.

Before you begin

Role required: snc_external

About this task

A request or change request may require approval from another employee within the same organization.

Procedure

1. Navigate to the business portal header,
2. Select **Notification** > **View all notifications**.
3. Select a record in the Approvals section of the Notifications page.
   The system displays a read-only view of the record approval form. For requests that include one or more items, these items appear in a collapsible list at the bottom of the Request form.
4. **Optional:** Click a requested item at the bottom of the Request form to view the details in a pop-up window.
5. Select **Approve**.
   The system makes the following updates:
   - The record status is set to **Approved**.
   - The record status is displayed after the record number in the Related Records widget on the Case form.
   - The record status is added to the Case form.
     - If the record is approved by the customer administrator or if the customer self-approves the request, the change in status is added to the **Additional comments** field.
     - For other approvers, the change in status is added to the **Work notes** field.
   - The approval record is updated in the Approval table.

Related topics

View cases and case tasks from the Business Portal

Search for information using Business Portal

Use the search feature on the business portal header and home page to find information about a question or an issue.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

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Procedure

1. Navigate to the business portal.
2. Enter a search term into the **Search** field.
3. Select the search icon.
   A list of articles related to the search term is displayed.
4. Select a link to view an article.

Related topics

Search the knowledge base on Business Portal

View common questions (FAQs) on Business Portal

Search the knowledge base on Business Portal

Use the business portal to search the knowledge base or view a list of popular knowledge base articles.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

The business portal includes a link to the knowledge base that you can use to search for information, read and rate articles, and submit feedback. Under this link, the portal displays a list of popular knowledge base articles. If the information that you need isn't included in this list, you can search the knowledge base for the desired information.

Procedure

1. Navigate to the business portal.
2. Select **Resources** > **Knowledge**.
   The knowledge page displays a separate category for each of the products purchased by this customer. It also displays lists of articles by:
   - Featured content
   - Most useful
   - Most viewed
3. Do one of the following,

Option	Description
Click a product to display more specific in formation	Displays a list of categories on the left and ar ticles on the right. Select a category to drill down even further.
Click a link from one of the lists	Displays the article.
Type a topic in the Search field and press the Enter key	Displays a list of related articles. Select a link to display the desired article.

Related topics

Search for information using Business Portal

Deflect cases with knowledge content

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Chat with an agent from the Business Portal

Chat with a virtual agent or a customer service agent from the business portal to resolve issues quickly.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

Procedure

1. Select the Chat icon in the business portal to start a conversation.
   A virtual agent or a customer service agent responds.
2. **Optional:** To talk to a person instead of a virtual agent, select the kebab menu ( ) then select **Call Support (Daily 5AM - 11PM)**.
3. To end the chat, select End Conversation icon ( ).

What to do next

If the agent creates a case or links the discussion to an existing case, you can view these cases from the business portal. To display the case list, select **Requests** > **View submitted requests** > **View cases & tasks**.

Related topics

Get help using virtual agent conversations from Business Portal

Create a product case from Business Portal

Get help using virtual agent conversations from Business Portal

Predefined Customer Service Virtual Agent chatbot conversations help end users complete common self-service tasks. Configure chatbot topics with predefined NLU to interpret user input and return relevant responses based on conversation context.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

If you're anonymous (not logged in to the application), get help by entering keywords for an issue and choose to get transferred to a live agent.

Install the plugin Customer Service Virtual Agent Conversations (ID: com.sn_csm.virtualagent) to view the chatbot topics.

A user with a proxy_contact role can also check the case status for a customer.

About this task

The information exchanged during the conversation flow (user inputs and bot responses) enables the chatbot to fulfill a user request or assist a user in completing a task. If the user has a question or an issue with an existing product or order, the virtual agent searches the keyword and displays relevant knowledge articles that can help resolve the issue. If there are no relevant articles, it creates a case.
ServiceNow NLU enables discovery of the chatbot topics based on either the keywords entered in the chat or the user-intent and matches an entity with the user input. It also makes the entity available to the topic if there's a match.

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Procedure

1. Navigate to the business portal.
2. Select **Chat**.
   You can select **Show Me Everything** to display all available topics or enter keywords to narrow down the results to relevant topics.
3. If you're a logged-in user, enter keywords to get help on a case, an issue, or an order.
   - If NLU is enabled, it guides you through the right topic based on the utterance.
   - If NLU isn't enabled, it displays topics based on the match for the entered keywords. You can make a selection from all available topics displayed.

   Note: Contact your administrator to determine whether the topics are NLU-enabled.

4. Use

To	Follow these steps
Check the status of a case	**a.** Initiate checking the case status. ▪ If you're using the virtual agent conversation without en abling NLU, select **Check Case Status**. ▪ If you're using NLU in your virtual agent conversation, enter an utterance to check the status of a case. **Note:** If you provide a case number, you'll be pre sented with the details of the case. **b.** Select a case from the case list that you would like to get help for. **c.** When the case information displays, you can do one of the following: ▪ Add a comment ▪ Attach a picture ▪ Check another case ▪ Contact an agent.
Get help with a product	Enter a keyword for your issue. The chatbot returns a list of re lated knowledge articles to help resolve your issue. If there are no matching articles associated with the description, a case is automatically created with the following information: ○ Case identification number ○ Short description ○ State ○ Priority Take any of the following additional actions: ○ Update the product and asset ○ Add a comment

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To	Follow these steps
	○ Attach a picture ○ Contact an agent
Get help	If you're an anonymous user not logged in to the application, enter keywords for your issue. The chatbot returns a list of related knowledge articles that have been made public. If there are no matching articles that would help resolve the issue, you can choose to be transferred to a live agent.
Submit Request	**a.** Initiate submitting your request for one of the catalog items. ▪ If you're using the virtual agent conversation without enabling NLU, select **Show Me Everything** and then select **Submit a request**. ▪ If you're using NLU in your virtual agent conversation, enter an utterance for example open a request, that will identify that there is a NLU and intent associated. **b.** Select the catalog item. The Search Catalog Item topic block searches for the catalog item and displays a link based on your search. For more information about search catalog item, see **Note:** Wherever the topic is opened, the records will display on the same portal. **c.** Click on the link displayed and exit the virtual agent if you do not have any further request.
Create Case	Creates a case from Virtual Agent. You need the following fields to create a case: ○ short_description (mandatory) ○ description ○ account_sys_id ○ contact_sys_id ○ consumer_sys_id The values of these can be empty. If the account, contact, and consumer fields are empty, the logged in user details are populated. The topic block returns the variable case_sys_id from the toic block.
Update Case	Updates a case from Virtual agent. You need the following 2 fields to update a case: ○ case_sys_id (mandatory) - must be a valid case ID. If the ID is valid the following 4 options are displayed: ▪ Add product information is displayed only if enable_product_update is set to true. ▪ Add a comment

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To	Follow these steps
	▪ Attach an image ▪ Cancel ○ enable_product_update - If set to true, the Add product information option is displayed. It updates the asset and model information. The topic block returns the variable case_sys_id

5. To exit a chat conversation, select **I'm done**.

Related topics

Customer Service Virtual Agent conversations

Maximizing code reuse with topic blocks

View a publication on Business Portal

View the details of a publication on the business portal and download any attachments.

Before you begin

Role required: sn_customerservice.customer

About this task

The **Publications** link on the business portal displays a list of current publications that is sorted by publication number.

Note: After a publication reaches its expiration date, it is automatically removed from the Publications list.

Procedure

1. Navigate to the business portal.
2. Select **Resources** > **Publications** in the header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.
3. If desired, search the Publications list by entering the search term in the search field at the top of the list.
4. Select a publication name to open.
5. If the publication has attachments, select the attachments to download from the pop-up window.
6. Close the pop-up window.
7. Select the return arrow at the top of the publication to return to the Publications list.

Related topics

View or modify a case from the Business Portal

Request an item or service from the Business Portal

Browse the catalog and create a request for an item or a service from the business portal.

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Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer, sn_csm_proxy_cont

About this task

Users can make requests for a product or service from the business portal. Customer administrators, partners, and case managers can also make requests.

Note: Creating a request from the business Portal portal requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the administrator to provide external customers with access to request records.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **Submit a request** > **Submit any request**
3. Browse the service catalog and select the desired item or service.
   Select topics from the navigation menu to view related articles and catalog items.
4. On the form, fill in any necessary information related to the request.
5. Select **Submit**.
   The system processes the request, creates it along with related records, and shows the details on the record view page.

Related topics

View cases and case tasks from the Business Portal

View cases and case tasks from the Business Portal

View the list of cases and case task from the business portal to view its details.

Before you begin

Role required: sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.customer_case_manager, sn_customerservice.customer, sn_customerservice.consumer

About this task

If a case has one or more related records, a Related Records widget is displayed on the case view page that lists those records.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks** in the portal header.
   You can select the case type from Categories and filter the list of records before selecting a case.
3. Select a case to view its details.
4. **Optional:** For My requests, expand the **Stage** field to display more details about the request process.
5. Select the **X** in the upper corner to close the details window.

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Related topics

View or modify a case from the Business Portal

Approve, change, or registration request from Business Portal

View or modify a case from the Business Portal

View or modify the information in a customer service case.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

Procedure

1. Select **Requests** > **View submitted requests** > **View cases & tasks** in the portal header.
2. Select the desired case number to open the case view page.
3. Post required comment on the Activity tab or upload attachment on the Attachments tab.
   All other fields on the form are read-only.
4. Select **Send**.

Related topics

Close a case from the Business Portal

Complete a customer service satisfaction survey

Close a case from the Business Portal

Close completed or resolved cases from the business portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.consumer

About this task

This feature is available for the business portal (B2B) for product.
The **Close Case** button is not available for cases in the **Resolved** or **Closed** states.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **View submitted requests** > **View cases & tasks** in the portal header.
3. Open the desired case.
4. Select **Actions** > **Close Case**.
5. In the confirmation pop-up window, select **Close Case**.
   When a case is closed from the portal:
   - The case status in the Case details section is updated to **Closed**.

     Note: You cannot add comments after the case is closed. You can only view the previous comments in the activity stream.

   - The case additional comments and resolution notes are updated with **Closed by customer**.
   - The case resolution code is set to **Solved by customer**
   - A message at the top of the portal confirms that the case has been closed.
   - The system displays a customer satisfaction survey.

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6. Complete the customer satisfaction survey.
   You can also choose to skip the survey. Either choice returns you to the case list on the portal.

Related topics

View or modify a case from the Business Portal

Complete a customer service satisfaction survey

Complete a customer service satisfaction survey

After accepting a solution for a case, complete a customer service satisfaction survey to provide your feedback.

Before you begin

Role required: none

When a customer accepts a proposed solution for a case by clicking **Accept Solution** on the case form, a satisfaction survey is displayed in the portal. The customer has the option of completing or skipping the survey. Either choice returns the customer to the list of cases on the self-service portal.

To complete the survey:

About this task

Customer satisfaction surveys are sent after a case solution is accepted or a case is closed. Your feedback helps your service team identify areas for improvement and maintain high service quality.

Procedure

1. Answer each of the survey questions.
2. Select **Submit**.

Related topics

Close a case from the Business Portal

Deflect cases with knowledge content

Enable customers to search for information from the knowledge base and and find solutions to their issues.

Before you begin

Role required: sn_customerservice_customer

About this task

The business portal Case form displays contextual search results based on text entered in the Subject field. These search results provide targeted solutions to customers. Customers can search for information that is related to a case when opening a case. If the search results in any related content, the customer can preview the content.

Note: By default, search results include knowledge articles, solved questions, and pinned articles.

Procedure

1. Navigate to the business portal.
2. Select **Request** > **Submit a request** > **Submit a case** > **Submit a product case**.
3. Start entering in the **Subject** field.

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If there are any search results that match, they're displayed in the **Related Content** widget.

> **Note:** If embedded search has been enabled, the results are displayed inline in the Case form in a **Knowledge results** section and are read only.

4. Perform one of the following actions.
   - Select one of the content links in the **Related Search Results** widget to enter the content directly.
   - Select one of the content links in the embedded **Knowledge results** section to open the content inline as read only.
5. **Optional:** Select **This helped** to mark the content as helpful for resolving the associated case.
6. Select **Submit**.

Related topics

Search the knowledge base on Business Portal

View install base information from the Business Portal

View a list of install base to track the instances provisioned for your account and see which products or services run on them.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

You can view all cases and the service status from the last 30 days as well as all active, past, and planned outages. You can also view any active entitlements for the install base. An entitlement is active when its end date is not in the past or it has no end date. If it is linked to a contract, the contract must also be active.

> **Note:** You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

Procedure

1. Navigate to the business portal.
2. Select **My hub** > **Manage install base items** in the header menu.
   The system displays a list of install base items that belong to your account.
3. Select an install base to view the details including cases created on the install base in the last 30 days, active entitlements, as well as service status and outage history.
4. **Optional:** To create a case directly from the install base details, select **Create Case**.

Related topics

Create a case for install base from the Business Portal

View product information from Business Portal

Create a case for install base from the Business Portal

Create a case about a question or issue on your install base from the business portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin

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About this task

Install base enables you to track which instances have been provisioned for your account and the products and services that run on them.

Procedure

1. Navigate to the business portal.
2. Select **Requests** > **Submit a request** > **Submit a case** > **Submit an install base case**.
3. Fill out the fields on the form, as required.

Create Case form

Field	Description
Product	The sold product you have a question on or issue with.
Install Base	The install base item you have a question on or issue with.
Priority	The assigned priority: ○ 1 — Critical ○ 2 — High ○ 3 — Moderate ○ 4 — Low (default)
Subject	A brief description of the question, issue, or problem.
Description	A more detailed description of the customer question, issue, or problem.

Note: Currently, the **Save as Draft** option is not optimized for Customer Service Management portals and, it is inactive by default.

4. Select **Submit**.
   The case is created, assigned a case number, and added to the user's case list. Select **My Cases** at the top of the customer portal to view the Cases list.

Related topics

View install base information from the Business Portal

View or modify a case from the Business Portal

View product information from Business Portal

View a list of products to track the products or services sold to your account and manage your services using service catalogs.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, or sn_customerservice.partner_admin

About this task

You can view a list of products or services that have been sold to your account. You can also view any cases created on the product and all active contracts and entitlements for the product.
An entitlement is active if:

- Its end date isn't in the past or it has no end date.
- The contract it's linked to is also active.

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A contract is active if:

- Its state is set to active
- It's linked to a product with an active entitlement.

You can modify the **Active Entitlements** widget to define your own filters for active entitlements.

If product catalog items have been set up in your instance, you can use the **Service Catalogs** widget to view context-sensitive service catalogs based on the services you're subscribed to. Extend your services using service catalogs and request additional items on the services that you have subscribed to.

Procedure

1. Navigate to the business portal.
2. Select **My hub** > **Manage sold products** in the header menu.
   The system displays a list of products or services sold to your account.

   You can only view sold products and all extensions of sold products that are not product inventories.
3. Select a sold product to view the details associated to it.

Record view of the sold product

List of fields on the record view of the sold product along with their descriptions.

Field	Description
Number	Unique number of the sold product.
Product	Reference to the product model from the CMDB table.
Name	Name of the sold product.
Account	Account associated with the sold product.
Contact	Contact associated with the sold product.
Product offering	Product offering that is associated to the sold product.
Product specification	Product specification associated to the sold product.
Product location	Location associated to the sold product.
State	State of the sold product.
Unit Net Price	Net price of a single unit of sold product.
Quantity	Quantity of a product or service sold to a customer.
Model categories	Reference to the model category table.
Product model's short description	Brief description of the product model.
Product model's description	Detailed description of the product model.

4. View the cases and characteristics associated to the sold product in the related list.

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Related list descriptions

Related lists and their descriptions.

Related list	Description
Cases	View all cases associated to the sold product.
Characteristics	View the characteristics associated to a particular sold product like the characteristic value and the option.
Child sold products	View the child sold products associated to the sold product.
Product information	View the pricing related information of the sold product.

5. Perform one of the desired actions on the sold product.

   Install the Customer Life Cycle Management Self service plugin (sn_clm_selfservice) to perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions. The flows can be performed only by the customer personas and only on the sold products where the **Contact** field is the same as the logged in user.

   - Modify a sold product. To learn how to modify a sold product, see Modify a sold product and hierarchy
   - Suspend a sold product. To learn how to suspend a sold product, see Supending sold products.
   - Resume a sold product. To learn how to resume a sold product, see Resuming sold products.
   - Disconnect a sold product. To learn how to disconnect a sold product, see Disconnecting sold products

Related topics

Activate Customer Life Cycle Management Self-Service

View Product Inventory information on Business Portal

View Product Inventory information on Business Portal

Enable customers to view and track the list of product inventories associated to their account.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.customer_admin, sn_customerservice.partner, sn_customerservice.partner_admin

About this task

Install the Customer Life Cycle Self Service plugin (com.snc.customer_lifecycle_mgmt_self_service) to perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions on product inventories.

To learn how to install the Customer Life Cycle Self Service plugin (com.snc.customer_lifecycle_mgmt_self_service), see Activate Customer Life Cycle Management Self-Service.

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Procedure

1. Navigate to the business portal.
2. Select **My Hub** and then **Manage product inventories** from the header menu.
   The system displays a list of product inventories associated to your account.
3. Select a product inventory to view the record details.

Record view of product inventories

Field	Descriptions
Number	Unique number of the product inventory.
Product	Reference to the product model from the CMDB table.
Name	Name of the product inventory.
Account	Account associated to the product inventory.
Contact	Contact associated to the product inventory.
Product offering	Product offering associated to a product inventory.
Specification	Product specification associated with a product inventory.
Location	Location of the product inventory.
State	State of the product inventory. **Note:** If the state is **Active**, you can't perform the **Resume** action on the product inventory.
Unit net price	Net price of a single unit of a product inventory.

4. View the cases and characteristics associated to the product inventory in the related list.

Related list descriptions

Related list	Description
Cases	View all cases associated to the product inventory.
Characteristics	View the characteristics associated to a particular sold product like the characteristic value and the option.
Child sold products	View the child sold products associated to the sold product.
Product information	View the pricing related information of the sold product.

5. Perform one of the desired actions on the product inventory.

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Install the Customer Life Cycle Management Self service plugin (sn_clm_selfservice) to perform the **Modify**, **Suspend**, **Resume**, and **Disconnect** actions. The flows can be performed only by the customer personas and only on the sold products where the **Contact** field is the same as the logged in user.

- Modify a product inventory. To learn how to modify a product inventory, see Modify product inventory records
- Suspend a product inventory. To learn how to suspend a product inventory, see Suspend product inventory records.
- Resume a product inventory. To learn how to resume a sold product, see Resume product inventory records.
- Disconnect a product inventory. To learn how to disconnect a sold product, see Disconnect product inventory records

Related topics

Activate Customer Life Cycle Management Self-Service

View product information from Business Portal

Create a product case from Business Portal

Create a case about a question or issue on a product from the business portal.

Before you begin

Role required: sn_customerservice.customer, sn_customerservice.partner, sn_customerservice.customer_admin, or sn_customerservice.partner_admin, sn_acct_consumer.consumer

Procedure

1. Navigate to the business portal.
2. Select **Request** > **Submit a request** > **Submit a case** > **Submit a product case**.
3. On the form, fill in the fields.

Note: Depending on your role, you might not see the **Account** and **Contact** fields.

Create Case form

Field	Description
Account	The account for which you're creating the case.
Contact	The name of the customer contact for this case.
Consumer	The name of the consumer for this case. **Note:** This field is active only when the Customer Data Models for B2B2C plugin is installed. Once Account is selected, only consumers belonging to the account are displayed.
Asset	The asset tag number or the serial number of the asset associated with this case.
Product	The product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro).

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Field	Description
	If you select an asset in the **Asset** field, this field is auto-populated if the associated product information is available in the asset record. A product may be associated with multiple assets.
Priority	The available assigned priorities are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4 - Low (default)
Subject	A brief description of the customer question, issue, or problem. **Note:** When you start entering the subject, the application searches for relevant content in the knowledge bases configured for the portal. the results are displayed in the **Related Content** list.
Description	A detailed description of the customer question, issue, or problem.

Note: Currently, the **Save as Draft** option isn't optimized for Customer Service Management portals and, it's inactive by default.

4. Select **Submit**.

Result

The case is created, assigned a case number, and added to the creator's case list. To view this list, navigate to **Requests** > **View Submitted requests** > **View Cases and tasks** tab on the business portal header and select **All Cases** in the left pane.

Related topics

View or modify a case from the Business Portal

Chat with an agent from the Business Portal

Guest users experience on Business Portal

Guest users can view the header, footer, knowledge articles cards, and resources menu on the home page.

Guest users landing on the Business Portal can access the home page and several public elements, including the header, menu, footer, and banner widgets, which feature the **Browse Services** and **FAQs** buttons.

They can also view taxonomy topic cards showcasing public content, such as articles and catalog items, and the Knowledge quick link widget displaying public articles.

However, on selecting any card, button or menu items, the guest users are redirected to the login page.

Enable language selection for guest users

The language selector widget enables guest users and unauthenticated users to select, view, and update content in their preferred language.

When a user selects a preferred language, the portal content reloads into the selected language. The widget is enabled by default on the Knowledge portal, the Customer Service Management

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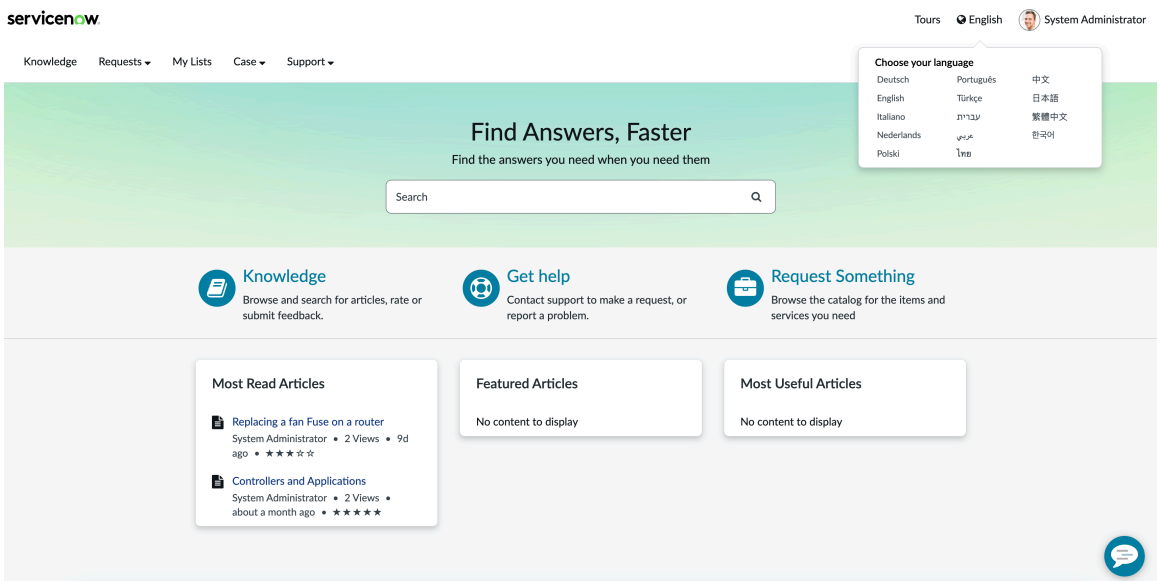
portal, and the Consumer Service portal. Users can map their languages with regions to view all available languages in the form of a pop-up on the same screen.

To enable the language selector on the business portal, see Enable a language selector in portal headers.

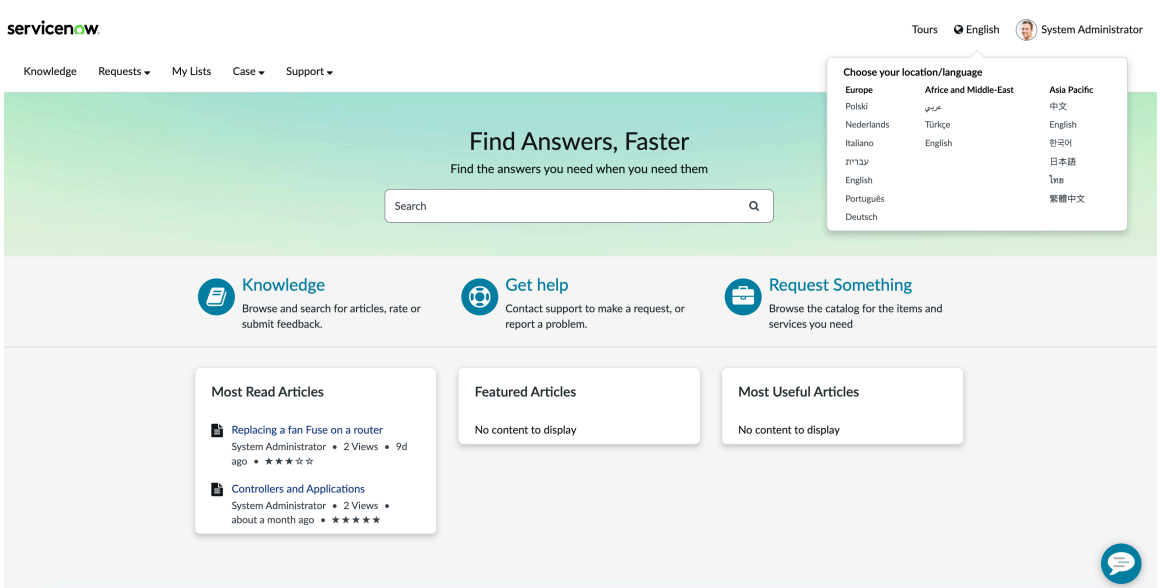
Language selector widget



If languages aren't grouped, users can view all available languages as a full-screen experience.

Note: The full screen mode is available in the mobile view.

Language selection experience without region grouping



Related topics

- Enable language selector widget
- Service Portal properties
- Create regions for language selection in portals

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Walk-up Check-in on Business Portal

Schedule an in-person walk-up appointment at a service center from the Business Portal.

Before you begin

Install Walk-up for CSM (com.snc.walkup_for_csm) app from ServiceNow store.

Role required: sn_customerservice.customer

About this task

Walk-up check-in enables business users to schedule appointments for in-person support at service centers. The system automatically retrieves the nearest service center and provides appointment scheduling options.

Procedure

1. Navigate to the Business Portal.
2. Navigate to **Requests** > **Submit a request** > **Walk-up check in** in the portal header.
   The application identifies the nearest service center.
3. Schedule an appointment.
   For details, see Schedule appointments or join a queue from the Self Service portals.

Related topics

Schedule appointments or join a queue from the Self Service portals

Using Walk-up Experience

View common questions (FAQs) on Business Portal

View a list of frequently asked questions on the Business Portal to find answers for some common questions.

You can access the frequently asked questions page by navigating to > **Resources** > **FAQs**. The system displays a list of 10 frequently asked questions as a default view.

Related topics

Portal FAQ widget

Add and configure the Portal FAQ widget

View work orders on Business Portal

View work orders and work order details related to your cases from the Business Portal.

Before you begin

Activate the Customer Service with Field Service Management plugin (com.snc.csm_fsm_integration).

Role required: sn_customerservice.customer

About this task

When an agent creates a work order from a customer service case, customers can view the related work orders and work order details from the Business Portal.

Procedure

1. Navigate to the Business Portal.
2. Navigate to **Requests** > **View submitted requests** > **View work orders** in the portal header.

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A list of work orders is displayed, including the work order number, priority, state, and short description.

3. Select a work order to view its details.

Related topics

Using the Consumer Service Portal

The Consumer Service Portal is a web interface that your company can use to provide information and support to consumers.

The Consumer Service Portal is based on the ServiceNow Service Portal application. Consumers can use the portal to search for information, get their questions answered by other registered members, or request assistance from a customer service agent.

From the Consumer Service Portal, consumers can:

- Search for information, browse knowledge articles, and engage with the community.
- Start a chat session with a customer service agent
- Register, create a login, and create a user profile.

After registering and logging in to the Consumer Service Portal, consumers can:

- Edit user profile information and change passwords.
- Register new products and view a list of currently registered products.
- Contact a consumer service agent about a question or issue.
- Create cases and view a list of current cases.
- Accept or reject proposed case solutions.

Your consumer service portal activity usually begins on the consumer service portal homepage. If you are a logged in user, you see different information than non-logged in users. Your organization can customize the homepage.

Note: A new consumer service portal experience is available on the Consumer Portal. For details, see Using the Consumer Portal.

Consumer Service Portal homepage for logged in users

UI component	Description
Knowledge	**Knowledge** on the header and the main page takes you to the kb_home page. The knowledge home page allows you to search the knowledge base or view a list of top-rated or most viewed knowledge base articles.
Requests	Displays all your requests and you can also request from the catalog for items and services.
My lists	Lists all your cases.
Get help menu	Select **Get Help** to open a product or order case.
Support menu	Navigate to cases, orders, my products, and other quick links.

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Consumer Service Portal homepage for logged in users (continued)

UI component	Description
Tours	View a tour for additional guidance on how the Customer Service Management application works. Tours appear when your administrator creates them on certain pages.
Chat	Select **Chat** to chat with a virtual agent or a customer service agent.
Callback request	Request a callback when the wait time to reach agents is long or agents are unavailable.
Profile menu	Select your profile photo to either view your profile or logout.
Search	Enter a search term and select **Search** to view the search results.
Ask the Community	Select **Ask the Community** to access the Community homepage.
Get help	Select **Get help** to make a request or report a problem by opening a case.
Most viewed articles	View a list of most viewed articles.
Featured articles	View featured community content.
Most useful articles	View most useful articles based on the usage count of the articles.
The following components are available if you have installed communities.	
Recent solved discussion	View a list of recently solved discussions.
Recent community blog	View a list of recently published community blogs.
Community featured content	View a list of featured community content.

Note: Metadata for each entry in the widgets such as the number of views, number of days from the time the article or feature was published, and rating for the article is displayed.

Customizing the Consumer Service Portal

To customize this portal, navigate to **Service Portal** > **Portals** and select **Customer Service**. See Service Portal for more information about creating a custom interface.

Related topics

Usage calculation of self-service experiences

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Pre-chat from the Consumer Service Portal

As a user on the consumer service portal, you can initiate a conversation with support by answering the Pre-chat survey. The survey questions vary based on the session type such as logged-in or anonymous.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Select the chat icon ( ) on the portal page or use Facebook messenger if you are a Facebook user.
2. Answer the questions that help set the context for an agent to resolve your issue.
   You will be routed to an agent queue.

Related topics

Pre-chat surveys

Register for the Consumer Service Portal

Register for the Consumer Service Portal to gain access and create a consumer profile.

Before you begin

Role required: none

Ask your admin to install the External User Registration plugin (ID: com.sn_external_user_register) to view the register link on the Customer service portal header.

Procedure

1. Go to the Consumer Service Portal page by accessing your instance URL and adding a /csp suffix.
   For example, https://example.com/csp.
2. Select **Register**.
3. Fill in the fields on the registration form.
   Your email address must be unique. If you enter an address that is already in the system, you receive an error message. Try again with a different email address.
4. Select **Sign Up**.
   A verification email is sent to the email address you provided.
5. Select the link in the email to verify your email address.

Result

Your registration is complete. You can now log in to the Consumer Service Portal.

Related topics

Log in to the Consumer Service Portal

Log in to the Consumer Service Portal

Use the name and password that you created during the registration process to log in to the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

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Procedure

1. Navigate to the Consumer Service Portal.
2. Select **Log in** in the portal header.
3. Fill in the fields on the Log in pop-up window.
4. Select **Log in**.
   You are logged in to the Consumer Service Portal and your name and profile picture appears in the portal header.

Related topics

Register for the Consumer Service Portal

Change your password from the Consumer Service Portal

Change your password from the Consumer Service Portal

Change your password from the consumer portal.

Before you begin

Role required: sn_customerservice.customer

Procedure

1. Select your user name in the portal header to display the user profile information.
2. Select **Change Password**.
3. Fill in the fields on the Change Password form, as appropriate.

Change Password form fields

Field	Description
Current Password	The current password. This field is automatically filled in.
New Password	The new password. This password must: ○ Be a minimum of eight characters in length ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	Retype the new password.

4. Select **Change**.

Related topics

Log in to the Consumer Service Portal

View or edit a consumer profile

Registered users with the consumer role can view their consumer profiles, edit the information as needed, and change passwords.

Before you begin

Role required: sn_customerservice.consumer

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Procedure

1. Log in to the Consumer Service Portal.
2. Select your user name in the portal header and then select **Profile**.
3. To add a picture to your profile, select **Upload Picture** and select the desired image.
4. To update the personal information in your profile, including name, contact information, and address:
   a. Select the desired field.
   b. Enter the new information in the pop-up window.
   c. Select **Save**.
5. To change your password, select **Change Password**.
   The **Change Password** link appears on the consumer profile when the Self-Service Password Reset plugin (com.snc.password_reset) is activated.
6. Fill in the fields on the Change Password pop-up window and select **Update**.

Related topics

Change your password from the Consumer Service Portal

Register a product from the Consumer Service Portal

Users with the consumer role can register their products from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Service Portal.
2. Select **Support** in the portal header and then select **Register Product**.
3. Type a search term in the search field and press Enter to display a list of products.
4. Select the **Select** button on the card for the desired product.
5. Enter the **Serial Number** and the **Purchase Date** for the selected product.
6. Select **Register**.
   After the product is successfully registered, it appears in the My Products list, which includes the products registered to the current user.

Related topics

View a list of products from the Consumer Service Portal

Access your list of install base items from the Consumer Service Portal

View a list of products from the Consumer Service Portal

Users with the consumer role can view a list of their registered products from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

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Procedure

1. Log in to the Consumer Service Portal.
2. Select **Support** > **My Products** in the portal header.
   This displays a list of products registered to the current user.
3. If desired, select a product to display more information about the product.

Related topics

Register a product from the Consumer Service Portal

Access your list of install base items from the Consumer Service Portal

Access your list of install base items

Access your list of install base items from the Consumer Service Portal so that you can get the detailed information about an install base item. For example, with this list, you can see how many items are registered to you.

Before you begin

Role required: sn_customerservice.consumer, sn_customerservice.consumer_contributor, and sn_customerservice.relationship_contributor

Procedure

1. Log in to the Consumer Service Portal.
2. Navigate to **Support** > **Install Base**.
   In the header on the Consumer Service Portal, you can access a list of the install base items that are registered to you.

   In the list layout for an install base item, the details that are related to consumers in the **Household** and **Consumer** fields are visible. Only consumers with the appropriate roles can see the install base option in the support menu.
3. From the list, open an install base record to see all the details and cases for that install base item.

Related topics

Create a case from the Consumer Service Portal

Register a product from the Consumer Service Portal

Create a case from the Consumer Service Portal

As a user with the consumer role, you can create cases from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Service Portal.
2. Select **Get Help** in the portal header.
3. Choose between **Get Product Help** and **Get Order Help**.
4. Enter or search for a customer.
5. Enter a product or an order depending on what you selected above.
6. Enter a brief description in the **Subject** field.

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> **Note:** When you start entering the subject, the application searches for the relevant content in the knowledge bases configured for the portal and is displayed in the **Related Content** list.

7. Add a description in the **Description** field and add any attachment.

> **Note:** Currently, the **Save as Draft** option isn't optimized for Customer Service Management, and it's inactive by default.

8. Select **Submit**.

Result

The new case is created and added to the Cases list. To view the case, select the link in the case creation message or select **Cases** in the portal header, and then select the case number.

Related topics

View a case from the Consumer Service Portal

Chat with an agent from the Consumer Service Portal

View a case from the Consumer Service Portal

Users with the consumer role can view a list of cases from the Consumer Service Portal and select individual cases to see more detail.

Before you begin

Role required: sn_customerservice.consumer

About this task

Selecting a case opens a form with the following sections:

- A conversation that displays the interaction between the consumer and the customer service agent.
- The action that needs to be taken on the consumer's part, such as accepting or rejecting a solution.
- The case details, including the case number and current status.
- Any attached files.

Procedure

1. Log in to the Consumer Service Portal.
2. Select **Support** > **Cases** in the portal header to view a list of cases related to the current user.
3. Select the case number to view more information about the case.
4. If desired, type a message to the agent and select **Send**.
   Your message becomes part of the case conversation. All responses from the agent are also included in the conversation.

Related topics

Accept or reject a case solution from the Consumer Service Portal

Create a case from the Consumer Service Portal

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Accept or reject a case solution from the Consumer Service Portal

Users with the consumer role can accept or reject the proposed solution for a case from the Consumer Service Portal.

Before you begin

Role required: sn_customerservice.consumer

About this task

When an agent proposes a solution to a consumer's case, buttons for accepting or rejecting the solution appear in the section of the form that shows the consumer actions.

Procedure

1. Log in to the Consumer Service Portal.
2. Select **My Lists** in the portal header to view a list of cases.
3. Select **Action Needed**.
4. Select the required case number to view more information about the case.
5. Select one of the following from **Actions**.

Option	Description
Accept Solution	Accepts the solution proposed by the agent and changes the case state to **Closed**.
Reject Solution	Rejects the solution proposed by the agent af ter entering the reason for rejecting the solu tion. The case state changes to **Open** state.

Related topics

View a case from the Consumer Service Portal

Chat with an agent from the Consumer Service Portal

Chat with a virtual agent or a customer service agent from the Consumer Service Portal to resolve issues quickly.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Select the Chat icon ( ) in the Consumer Service Portal to start a conversation.
2. Select an option from the pre chat survey.
   A virtual agent or a customer service agent responds.
3. Enter your query to continue conversation.
4. **Optional:** To talk to a person instead of a virtual agent, select and then **Contact Support**.
5. When you're finished with the chat, select **End Conversation**.

What to do next

If the agent creates a case or links the discussion to an existing case, you can view these cases from the Consumer Service Portal by selecting **Cases** and displaying the case list.

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Related topics

Pre-chat from the Consumer Service Portal

Chat anonymously with an agent from the Consumer Service Portal

Chat anonymously with an agent from the Consumer Service Portal

Users that are not logged in can chat anonymously with an agent from the Consumer Service Portal to resolve issues more quickly.

Before you begin

Role required: none

Procedure

1. Select the Chat icon ( ) in the Consumer Service Portal to start a conversation.
2. Fill in the information and select **Submit**.
   A virtual agent or a customer service agent responds.
3. **Optional:** To talk to a person instead of a virtual agent, select and then **Contact Support**.
4. When you are finished with the chat, select **End Conversation**.

Related topics

Chat with an agent from the Consumer Service Portal

Pre-chat from the Consumer Service Portal

View a publication on the Consumer Service Portal

View the details of a publication on the Consumer Service Portal and download any attachments.

Before you begin

Role required: sn_customerservice.consumer

About this task

Displays a list of current publications. You can filter the publications on this list by category and you can further filter the list to show all publications or only those that are unread. You can sort the list by publish date or expiration date. You can also search for a specific term.

After a publication reaches its **Expiry Date**, it is automatically removed from the Publications list.

Procedure

1. Navigate to the Consumer Service Portal.
2. Select **Support** > **Publications** in the portal header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.
3. If desired, filter or sort the Publications list.
   - Select a category in the upper-left corner or select **All Categories**.
   - Select either **All Publications** or **Unread Publications** in the upper-right corner.
   - Select either **Publish Date** or **Expiry Date** in the Sort by field.
4. If desired, search the Publications list by entering the search term in the **Search Publications** field.
5. Select a publication name to open.

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6. If the publication has attachments, select **Attachments** in the upper-right corner.
7. Select the attachments to download from the pop-up window.
8. Close the pop-up window.
9. Select the return arrow at the top of the publication to return to the Publications list.

Related topics

View a case from the Consumer Service Portal

Using the Consumer Portal

Configure the Consumer Portal to provide a branded web interface where consumers can access information and request support from your company.

The Consumer Portal is based on the ServiceNow Service Portal application. Consumers can use the portal to search for information, or request assistance from a customer service agent.

From the Consumer Portal, consumers can:

- Search for information, browse knowledge articles.
- Start a chat session with a customer service agent
- Register, create a login, and create a user profile.

After registering and logging in to the Consumer Portal, consumers can:

- Edit user profile information and change passwords.
- Register new products and view a list of currently registered products.
- Contact a Consumer agent about a question or issue.
- Create cases and view a list of current cases.
- Accept or reject proposed case solutions.

Your Consumer portal activity usually begins on the Consumer portal home page. It has configurable widgets to display information. If you're a logged-in user, you see different information than non-logged-in users. Your organization can customize the home page.

Consumer Portal Home Page for Logged-in users

UI component	Description
Resources	Navigate to the Knowledge, Publications, or FAQ pages.
Requests	Submit a request or view submitted requests.
My hub	Manage products, install base items and household members.
Browse services	Browse through topics and request services.
FAQs	Get quick answers to common questions.
Search	Perform a search. • Enter a keyword for type-ahead search • Enter one or more words to view all search results

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Consumer Portal Home Page for Logged-in users (continued)

UI component	Description
Tours	View a tour for additional guidance on how the Customer Service Management application works. **Note:** Your administrator determines whether tours appear on pages or not.
Profile menu	View your profile or log out.
Live chat	Chat with a virtual agent or a customer service agent.
Track your case updates	View updates on your case.
Quick links to get you started	View links to knowledge articles, catalogs, pages, and external links.
Browse topics	Navigate through topics to explore services and resources.
Most trending articles	View a list of most viewed articles.
Most popular services	Request items and services from the catalog.
Footer	Contains important links, contact information, and legal details for easy access.

Customizing the Consumer Portal

To customize this portal, navigate to **Service Portal** > **Portals** and select **Consumer Portal**. For details about creating a custom interface, see Service Portal.

Related topics

Usage calculation of self-service experiences

Register for the Consumer Portal

Create a consumer account on the Consumer Portal to access self-service features, submit cases, and manage your profile.

Before you begin

Role required: none

Ask your administrator to install the External User Registration plugin (com.sn_external_user_register) to view the Sign-up link on the Consumer Portal header.

Procedure

1. Go to the Consumer Portal.
   You can access the Consumer Portal using the URL, <servicenow instance URL>/consumer_portal. For example, https://example.com/consumer_portal
2. Select **Sign Up**.
3. On the registration form, fill in the fields.

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Field	Description
Email Address	Your email address must be unique. If you enter an address that is already in the system, you receive an error message. Try again with a different email address.
First Name	Your first name.
Last Name	Your last name.
Password	This password must be: ○ Minimum of eight characters in length ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	Retype the password.

4. Select the check box to agree to the privacy policy and to the community terms and conditions. Select the links to access more information about these policies.
5. Select the reCAPTCHA verification check box.
   The Customer Service application uses the Google re-CAPTCHA service.
6. Select **Sign Up**.
   A verification email is sent to the email address that you provided.
7. Select the link in the email to verify your email address.

Result

Your registration is complete. You can log in to the Consumer Portal.

Related topics

Log in to the Consumer Portal

Log in to the Consumer Portal

Log in to the Consumer Portal to access your cases, products, and profile information.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Go to the Consumer Portal.
   You can access the Consumer Portal using the URL, <servicenow instance URL>/consumer_portal.
2. Select **Log in** in the portal header.
3. Enter username and password on the Log in pop-up.
4. Select **Log in**.

Result

You're logged in to the Consumer Portal and your name and profile picture appears in the portal header.

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Related topics

Register for the Consumer Portal

Change your password from the Consumer Portal

View or edit a consumer profile

View and update your consumer profile, including personal information and contact details, from the Consumer Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Portal.
2. Select your user name in the portal header and then select **Profile**.
3. To add a picture to your profile, select **Upload Picture** and select the image.
4. To update the personal information in your profile, including name, contact information, and address:
   a. Select the field.
   b. Enter the information in the pop-up window.
   c. Select **Save**.

Related topics

Soft PIN authentication

Change your password from the Consumer Portal

Change your Consumer Portal password from your profile settings.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Select your user name in the portal header to display the user profile information.
2. Select **Change Password**.
3. Fill in the fields on the Change Password form.

Change Password form fields

Field	Description
Current Password	The current password. This field is automatically filled in.
New Password	The new password. This password must: ○ Be a minimum of eight characters in length ○ Include at least one uppercase and one lowercase letter ○ Include at least one number
Confirm Password	Retype the new password.

4. Select **Change**.

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Related topics

Log in to the Consumer Portal

Search for information using Consumer Portal

Search the Consumer Portal to find knowledge articles and information related to your question or issue.

Before you begin

Role required: sn_customerservice.case_authorized_consumer or sn_customerservice.consumer

About this task

The portal has a search feature that you can use to search for information across several repositories. You can use the search feature on the home page or on the Consumer Portal header.

Procedure

1. Navigate to the Consumer Portal.
2. Enter a search term into the **Search** field.
3. Select the search icon.
   A list of articles related to the search term is displayed.
4. Select a link to view an article.

Related topics

Search the Knowledge Base on Consumer Portal

View common questions on Consumer Portal

Search the Knowledge Base on Consumer Portal

Search the knowledge base from the Consumer Portal to find articles, browse by product category, or view featured and popular content.

Before you begin

Role required: sn_customerservice.case_authorized_consumer or sn_customerservice.consumer

About this task

The Consumer Portal includes a link to the knowledge base that you can use to search for information, read and rate articles, and submit feedback. Under this link, the portal displays a list of popular knowledge base articles. If the information that you need isn't included in this list, you can search the knowledge base for the desired information.

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **Resources** > **Knowledge**.
   The knowledge page displays a separate category for each of the products purchased by this customer. It also displays lists of articles by:
   - Featured content
   - Most useful
   - Most viewed
3. Do one of the following,

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Option	Description
Select a product to display more specific in formation	Displays a list of categories on the left and ar ticles on the right. Select a category to drill down even further.
Select a link from one of the lists	Displays the article.
Type a topic in the Search field and press the Enter key	Displays a list of related articles. Select a link to display the desired article.

Related topics

Search for information using Consumer Portal

View common questions on Consumer Portal

Register a product from the Consumer Portal

Register a product on the Consumer Portal to track it in your account and access product-specific support.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Portal.
2. Navigate to **My hub** > **Register product** in the portal header.
3. Enter a search term in the search field and press Enter to display a list of products.
4. Select the **Select** button on the card for the product.
5. Enter the **Serial Number** and the **Purchase Date** for the selected product.
6. Select **Register**.

Result

After the product is successfully registered, it appears in the Manage products list.

Related topics

View a list of products from the Consumer Portal

Access your list of install base items from the Consumer Portal

View a list of products from the Consumer Portal

View the list of products registered to your account from the Consumer Portal and access details for each product.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Log in to the Consumer Portal.
2. Navigate to **My hub** > **Manage products** in the portal header.
   This displays a list of products registered to the current user.
3. If required, select a product to display more information about the product.

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Related topics

Register a product from the Consumer Portal

Access your list of install base items from the Consumer Portal

Request an item or service from the Consumer Portal

Submit a request for an item or service from the Consumer Portal service catalog.

Before you begin

Note: Creating a request from the Consumer Portal requires activation of the Customer Service with Request Management plugin (com.sn_cs_sm_request). It also requires that the administrator to provide external customers with access to request records.

Role required: sn_customerservice.case_authorized_consumer or sn_customerservice.consumer

About this task

Users can make requests for a product or service from the Consumer Portal. Customer administrators, partners, and case managers can also make requests.

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **Requests** > **Submit a request** > **Submit any request**
3. Browse the service catalog and select the item or service.
   Select topics from the navigation menu to view related articles and catalog items.
4. Fill in the fields on the form.

Fields	Description
Household	Household the customer belongs to.
Customer	Name of the customer. Selecting a household filters the list to members of that household only.
Product	Product that you need help with.
Subject	Brief summary of the issue. **Note:** When you start entering the subject, the application searches the configured knowledge bases and displays the results in the **Related Content** list.
Description	Detailed description of the issue. **Note:** When you start entering the subject, the application searches the configured knowledge bases and displays the results in the **Related Content** list.

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5. **Optional:** Upload any attachments.
6. Select **Submit**.

Result
The system processes the request, creates it along with related records, and shows the details on the record view page.

Related topics

View cases and tasks from the Consumer Portal

View orders

Access your list of install base items from the Consumer Portal

View install base items registered to your account from the Consumer Portal, including details for each device or service.

Before you begin
Install Customer Service Install Base Management (com.snc.install_base) app from ServiceNow store.

Role required: none

About this task
Install base items are the specific products and services provisioned to your account, such as a device registered under a service plan or an active software subscription.

Procedure

1. Log in to the Consumer Portal.
2. Navigate to **My hub** > **Manage install base items**.
   In the header on the Consumer Portal, you can access a list of the install base items that are registered to you.

   In the list layout for an install base item, the details that are related to consumers in the **Household** and **Consumer** fields are visible.

   Note: Only consumers with the appropriate roles can see the install base option.

3. From the list, open an install base record to see all the details and cases for that install base item.

Related topics

Get product help from the Consumer Portal

Register a product from the Consumer Portal

Get product help from the Consumer Portal

Submit a case from the Consumer Portal to get help with a product question or issue.

Before you begin
Role required: sn_customerservice.consumer or sn_customerservice.unified_consumer

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Procedure

1. Log in to the Consumer Portal.
2. Navigate to **Requests** > **Submit a request** > **Get help** > **Get product help** in the portal header.
3. Fill in the fields on the form.

Fields	Description
Household	Household the customer belongs to.
Customer	Name of the customer. Selecting a household filters the list to members of that household only.
Product	Product that you need help with.
Subject	Brief summary of the issue. **Note:** When you start entering the subject, the application searches the configured knowledge bases and displays the results in the **Related Content** list.
Description	Detailed description of the issue. **Note:** When you start entering the subject, the application searches the configured knowledge bases and displays the results in the **Related Content** list.

4. **Optional:** Add any attachment.
5. Select **Submit**.

Result

The new case is created and added to the Cases list. To view the case, select the link in the case creation message or select **Requests** > **View submitted requests** > **View cases and tasks** from the portal header, and then select the case number.

Related topics

View cases and tasks from the Consumer Portal

Chat with an agent from the Consumer Portal

View cases and tasks from the Consumer Portal

View your cases and tasks from the Consumer Portal, including case status, conversations with agents, and attached files.

Before you begin

Role required: sn_customerservice.consumer

About this task

Selecting a case or a task opens a form with the following sections:

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- A conversation that displays the interaction between the consumer and the customer service agent.
- The action that must be taken on the consumer's part, such as accepting or rejecting a solution.
- The case details, including the case number and status.
- Any attached files.

Procedure

1. Log in to the Consumer Portal.
2. Navigate to **Requests** > **View submitted requests** > **View cases and tasks** in the portal header to view a list of cases related to the current user.
3. Select any case to view more information about the case.
4. **Optional:** Enter a message for the agent and select **Send**.
   Your message becomes part of the case conversation. All responses from the agent are also included in the conversation.

Related topics

Accept or reject a case solution from the Consumer Portal

View all cases from the Consumer Portal

View all cases from the Consumer Portal

View all cases submitted from the Consumer Portal, including case details, agent conversations, and current status.

Before you begin

Role required: none

About this task

Note: View all cases menu item is visible only when the Customer Service with Request Management (com.sn_cs_sm_request) plugin is inactive.

Selecting a case opens a form with the following sections:

- A conversation that displays the interaction between the consumer and the customer service agent.
- The action that must be taken on the consumer's part, such as accepting or rejecting a solution.
- The case details, including the case number and current status.
- Any attached files.

Procedure

1. Log in to the Consumer Portal.
2. Navigate to **Requests** > **View submitted requests** > **View all cases** in the portal header.
3. Select any case to view more information about the case.
4. **Optional:** Enter a message for the agent and select **Send**.
   Your message becomes part of the case conversation. All responses from the agent are also included in the conversation.

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Related topics

View cases and tasks from the Consumer Portal

Accept or reject a case solution from the Consumer Portal

Accept or reject a case solution from the Consumer Portal

When an agent proposes a solution to your case, accept or reject it from the Consumer Portal to close or reopen the case.

Before you begin

Role required: sn_customerservice.consumer

About this task

When an agent proposes a solution, buttons to accept or reject it appear in the consumer actions section of the form.

Procedure

1. Log in to the Consumer Portal.
2. Navigate to **Requests** > **View submitted requests** > **View cases and tasks** in the portal header to view a list of cases.
3. Select **Action Needed**.
4. Select any case to view more information about the case.
5. Select one of the following from **Actions**.

Option	Description
Accept Solution	Accepts the solution proposed by the agent and changes the case state to **Closed**.
Reject Solution	Rejects the solution proposed by the agent after entering the reason for rejecting the solution. The case state changes to **Open** state.

Related topics

View cases and tasks from the Consumer Portal

Chat with an agent from the Consumer Portal

Start a chat session with a virtual agent or a customer service agent from the Consumer Portal.

Before you begin

Role required: sn_customerservice.consumer

Procedure

1. Navigate to the Consumer Portal.
2. Select the Chat icon ( ) in the Consumer Portal to start a conversation.
3. Enter your query to continue the conversation.

   Note: Pre chat survey is turned off by default.

4. **Optional:** To talk to a person instead of a virtual agent, select and then **Call Support**.
5. Select **End Conversation** after you're finished with the chat.

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What to do next

If the agent creates a case or links the discussion to an existing case, you can view these cases from the Consumer Portal by selecting **Requests** > **View Submitted Requests** > **View cases and tasks**.

Related topics

Chat anonymously with an agent from the Consumer Portal

Get product help from the Consumer Portal

Chat anonymously with an agent from the Consumer Portal

Start a chat session with an agent from the Consumer Portal without logging in to your account.

Before you begin

Role required: none

Procedure

1. Navigate to the Consumer Portal.
2. Select the Chat icon ( ) in the Consumer Portal to start a conversation.
3. Fill in the information and select the send icon ( ).
   A virtual agent or a customer service agent responds.
4. **Optional:** Select and then **Call Support** to talk to a person instead of a virtual agent.
5. Select **End Conversation** to close the chat.

Related topics

Chat with an agent from the Consumer Portal

Guest users experience on Consumer Portal

View a publication on the Consumer Portal

View publications on the Consumer Portal to read targeted communications and download any associated attachments.

Before you begin

Role required: sn_customerservice.consumer or sn_customerservice.unified_consumer

About this task

The **Publications** link on the Consumer Portal displays a list of current publications that is sorted by publication number.

Note: After a publication reaches its expiration date, it's automatically removed from the Publications list.

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **Resources** > **Publications** in the header.
   This displays a list of current publications. The information displayed for each publication includes the title, publish date, expiration date, and a brief description.
3. Search the Publications list by entering a search term in the search field.
4. Select a publication name to open.

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5. Select the attachments to download from the pop-up window, if the publication has attachments.
6. Close the pop-up window.
7. Select the return arrow at the top of the publication to return to the Publications list.

Related topics

Search the Knowledge Base on Consumer Portal

Walk-up Check-in on the Consumer Portal

Schedule a walk-up appointment at a service center from the Consumer Portal.

Before you begin

Install Walk-up for CSM (com.snc.walkup_for_csm) app from ServiceNow store.

Role required: sn_customerservice.consumer or sn_customerservice.unified_consumer

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **Requests** > **Submit a request** > **Walk-up check in** in the portal header.
   The application searches for your nearest service center.
3. To schedule an appointment, see Schedule appointments or join a queue from the Self Service portals.

Related topics

Schedule appointments or join a queue from the Self Service portals

View household members on the Consumer Portal

View the list of members in your household from the Consumer Portal to see their details and manage household accounts.

Before you begin

Install Customer Household Data Model (com.snc.household) app from ServiceNow store.

Role required: sn_customerservice.consumer

Note: You must be a householdHead to view household members. For details, see Add consumers to a household.

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **My hub** > **Manage household members** in the portal header.

Result

You can view the list of household members. Select any record to view details.

Related topics

Configuring households

Consumer Service Portal changes

View work orders on the Consumer Portal

View work orders and work order details related to your cases from the Consumer Portal.

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Before you begin

Activate the Customer Service with Field Service Management plugin (com.snc.csm_fsm_integration).

Role required: sn_customerservice.consumer

About this task

When an agent creates a work order from a customer service case, consumers can view the related work orders and work order details from the Consumer Portal.

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **Requests** > **View submitted requests** > **View work orders** in the portal header. A list of work orders is displayed, including the work order number, priority, state, and short description.
3. Select a work order to view its details.

Related topics

View orders

View your orders and order details from the Consumer Portal using the Order Management app.

Before you begin

Install Order Management (com.sn_ind_tmt_orm) app from ServiceNow store.

Role required: none

Procedure

1. Navigate to the Consumer Portal.
2. Navigate to **Requests** > **View submitted requests** > **View orders** in the portal header.

Result

You can view the list of orders. Select any order to view its details.

Related topics

Request an item or service from the Consumer Portal

View common questions on Consumer Portal

Browse common questions and answers on the Consumer Portal to quickly find information without contacting support.

You can access the frequently asked questions page by navigating to **Resources** > **FAQs**. The system displays a list of 10 frequently asked questions as a default view.

Related topics

Portal FAQ widget

Guest users experience on Consumer Portal

Guest users can access the Consumer Portal home page and view public elements, including the header, menu, footer, and banner widgets, without logging in.

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Guest users landing on the Consumer Portal can access the home page and several public elements, including the header, menu, footer, and banner widgets, which feature the **Browse Services** and **FAQs** buttons.

They can also view taxonomy topic cards showcasing public content, such as articles and catalog items, and the Knowledge quick link widget displaying public articles.

However, on selecting any card, button, or menu items, the guest users are redirected to the login page.

Using Conversational Appointment Booking

Customers can initiate an appointment booking conversation in a chat on your support portal using a Virtual Agent, and Agents can use Autopilot to display Virtual Agent topics during conversations.

Conversational Appointment Booking for Customers

Customers can complete the following tasks with a Virtual Agent:

- Book a new appointment in CSM
- Reschedule an appointment in CSM
- Cancel an appointment in CSM

Conversational Appointment Booking for Agents

Agents can use Autopilot to display Virtual Agent topics during Agent Chat conversations. For more information, see Conversation Autopilot.

Schedule an appointment with Conversational Appointment Booking

As a customer or consumer, schedule an appointment from the Virtual Agent chat window on the service portal.

Before you begin

Role required: customer, consumer

About this task

You can only schedule one appointment per location. Only logged-in users can schedule appointments.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Select the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. Enter `schedule appointment`.

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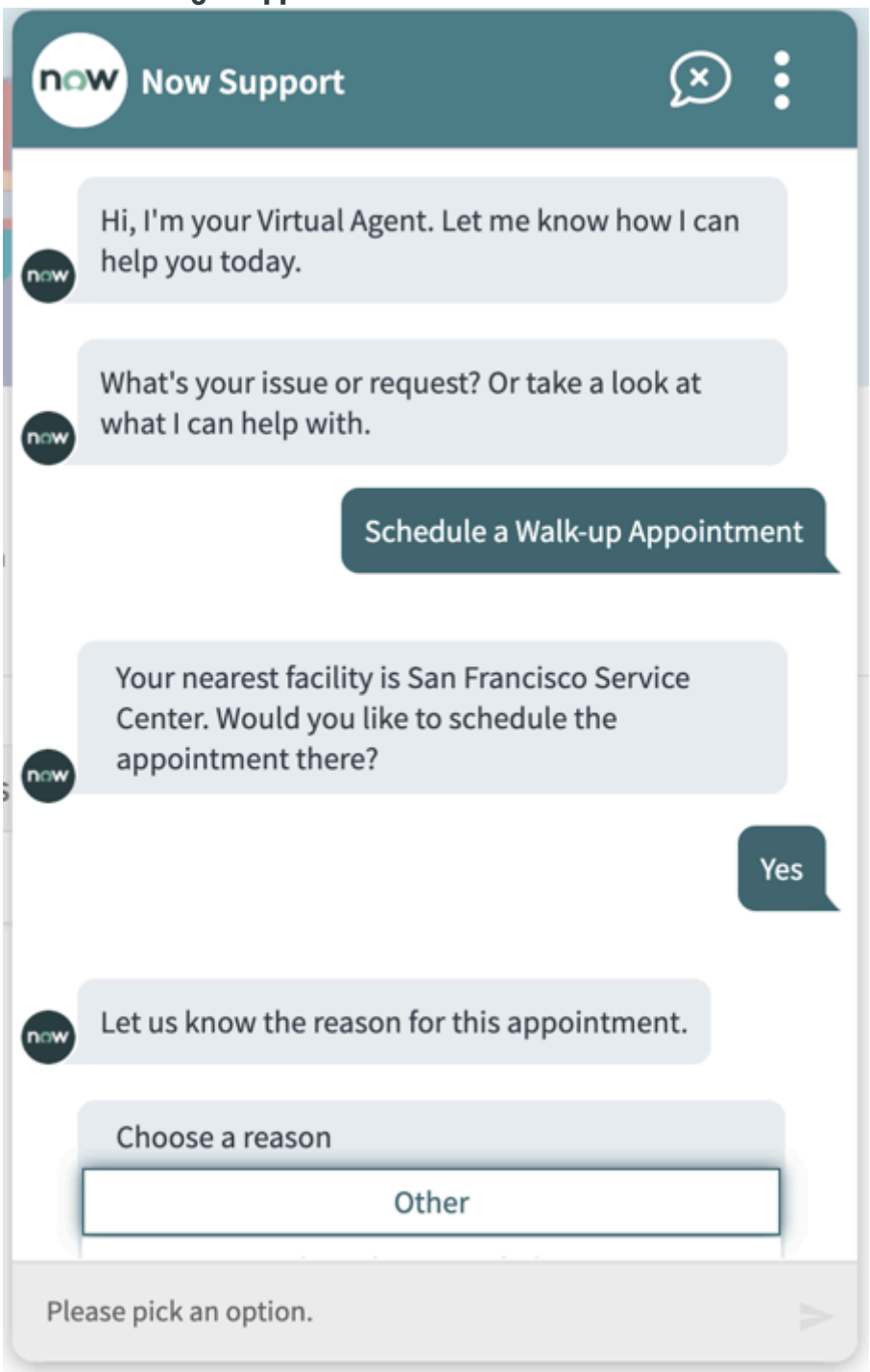
Start scheduling an appointment



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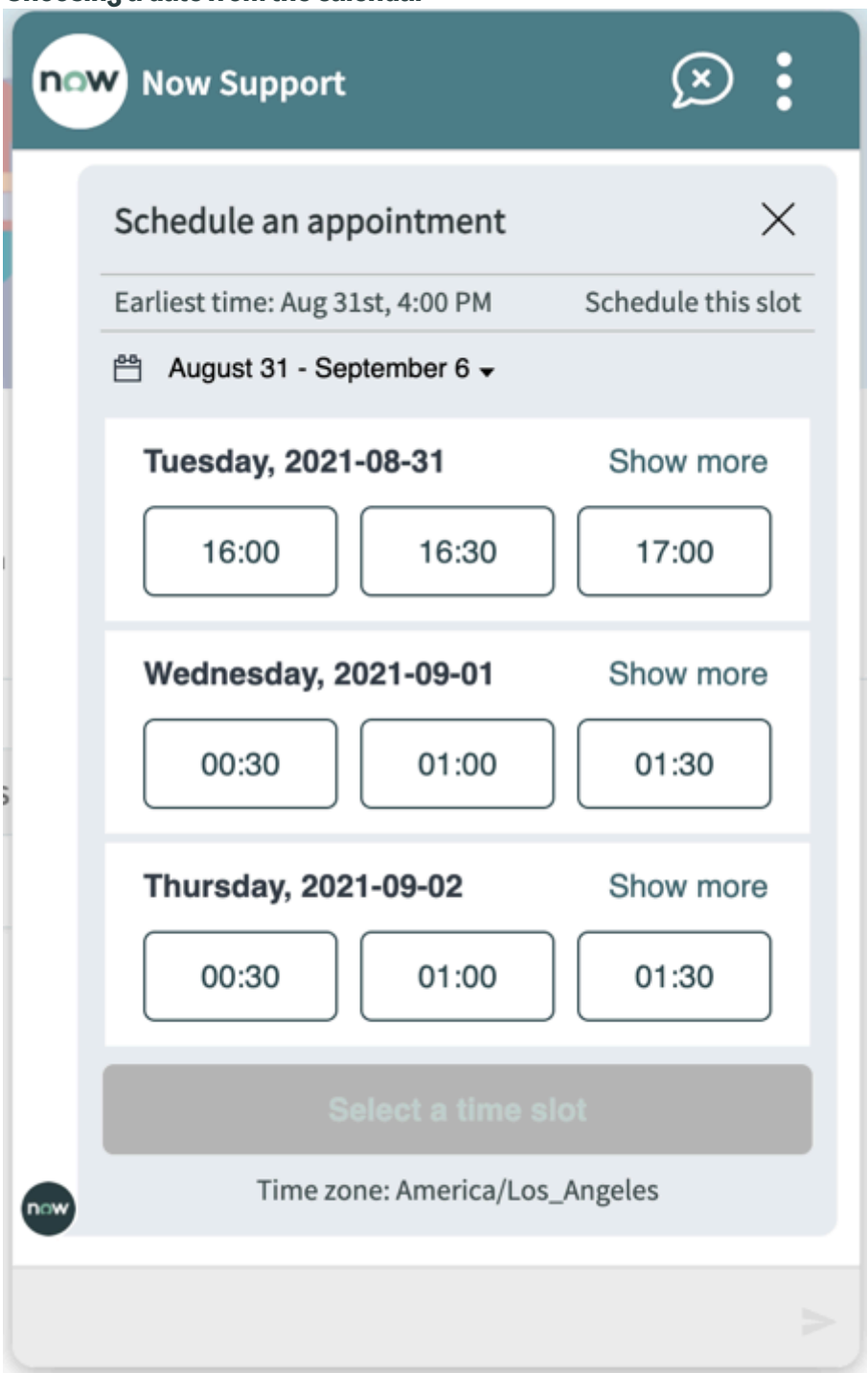
4. Choose a date from the calendar.

Choosing a date from the calendar



Result

The appointment is scheduled and the chat is complete.

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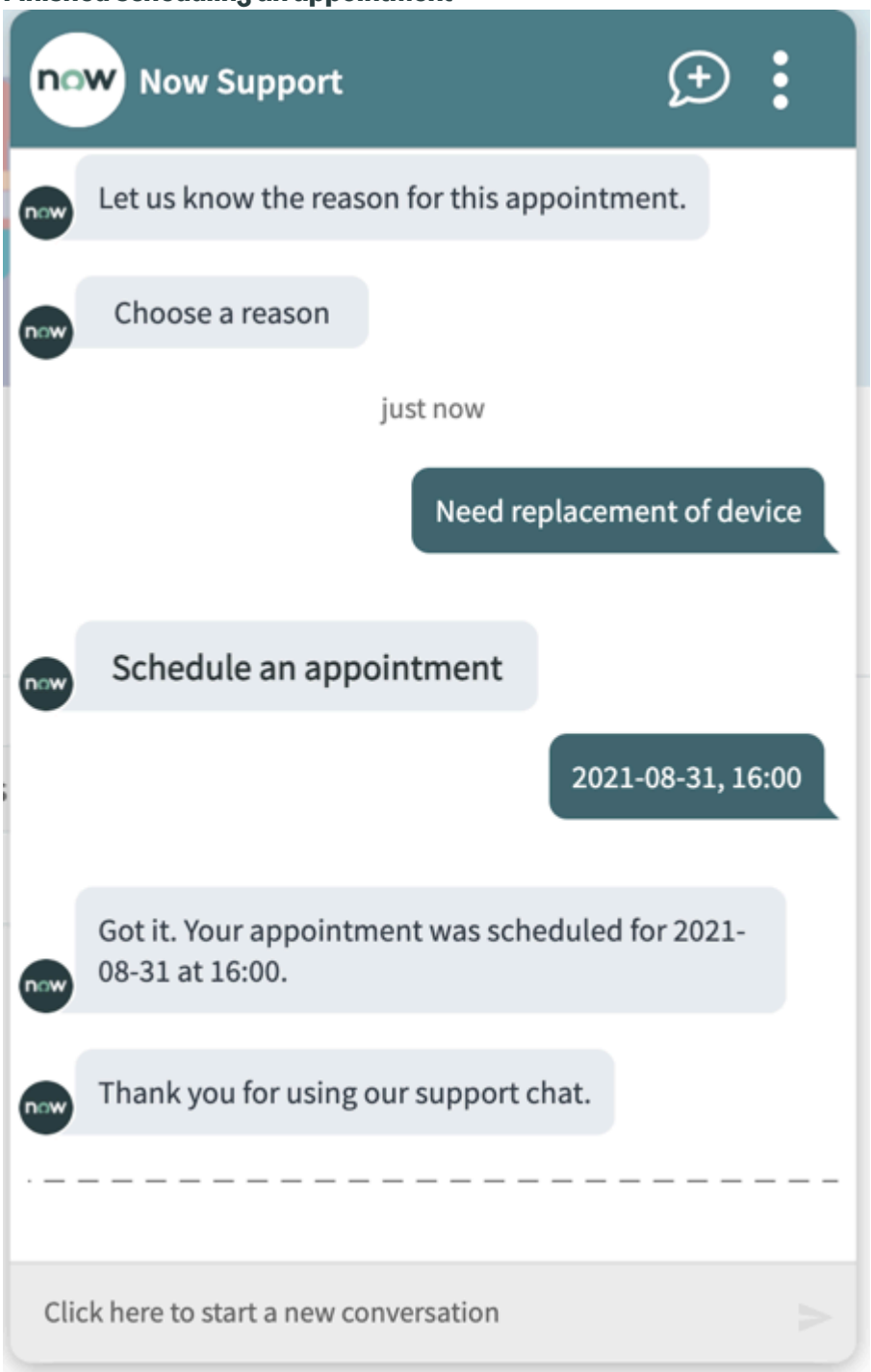
Finished scheduling an appointment



Related topics

Reschedule an appointment

Cancel an appointment

Reschedule an appointment with Conversational Appointment Booking

As a customer or consumer, reschedule an appointment from the Virtual Agent chat window on the service portal.

Before you begin

Role required: customer, consumer

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About this task

You can only schedule one appointment per location. Only logged-in users can schedule appointments.

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example

   For example: `https://yourportalurl.com/csm`

2. Click the chat icon ( ) to open the chat window and begin a Virtual Agent chat.
3. In the chat window, enter `reschedule appointment`.
4. Choose the appointment that you want to reschedule.

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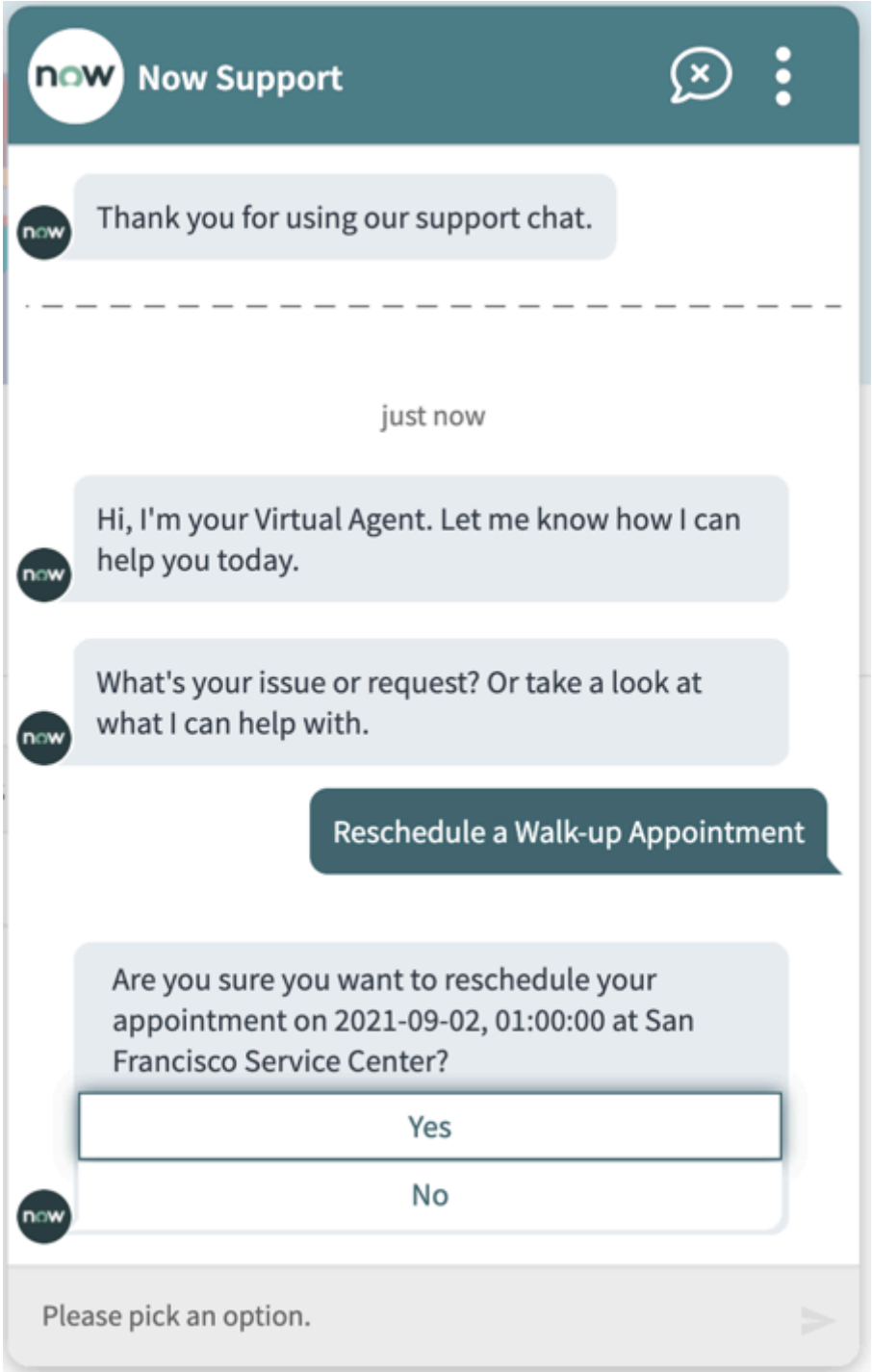
Rescheduling an appointment



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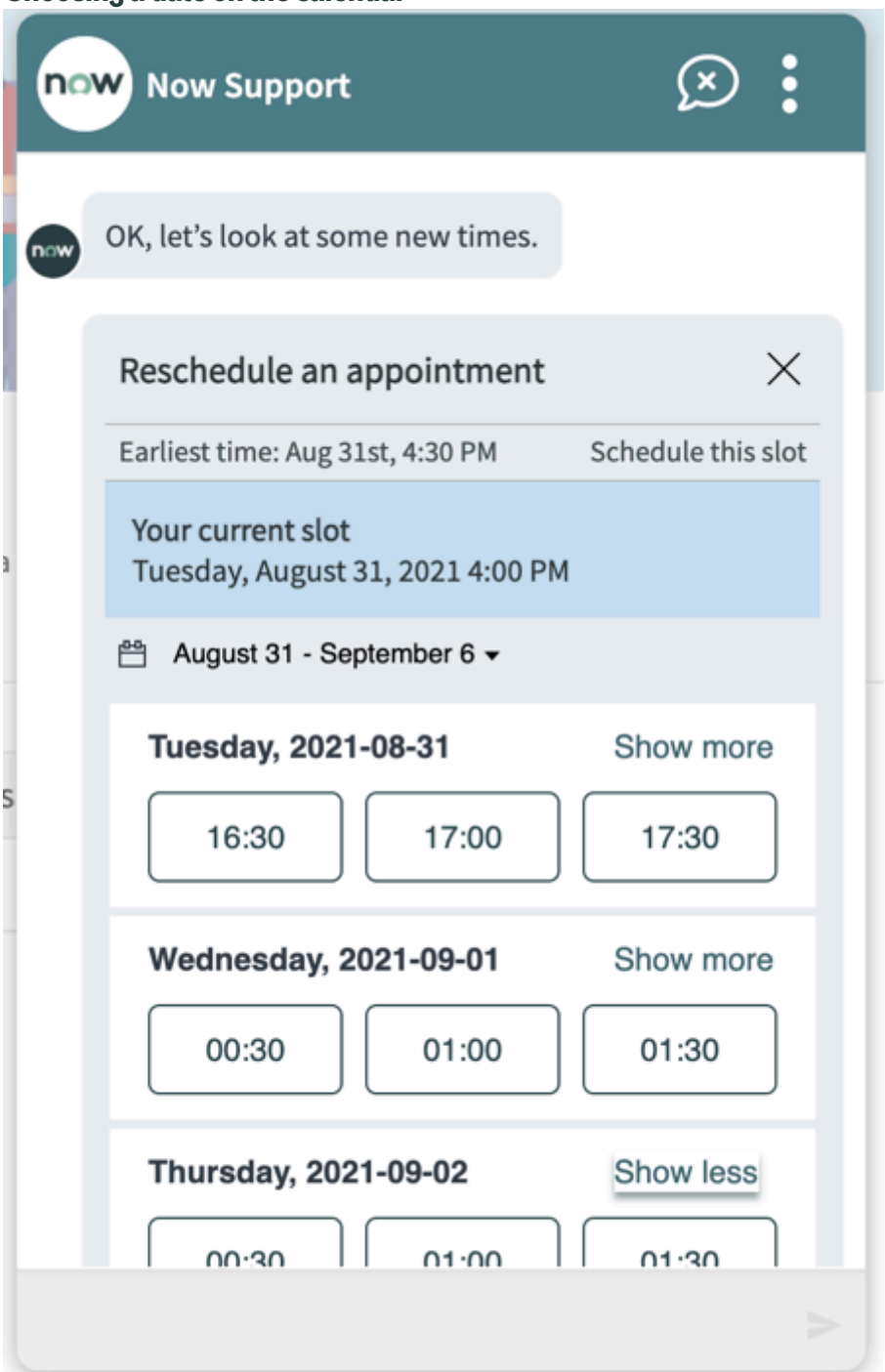
5. Choose a date from the calendar for the new appointment time.

Choosing a date on the calendar



Result

The appointment is rescheduled.

Related topics

Schedule an appointment

Cancel an appointment

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Cancel an appointment with Conversational Appointment Booking

As a customer or consumer, cancel an appointment from the Virtual Agent chat window on the service portal.

Before you begin

Role required: customer, consumer

Procedure

1. Navigate to the Customer Service Portal or Consumer Service Portal home page by adding the suffix `/csm` or `/csp` to your instance URL.

   Example
   For example: `https://yourportalurl.com/csm`

2. Click the chat icon ( ).
3. In the chat window, enter `cancel appointment`.
   The Virtual Agent shows the available appointments.

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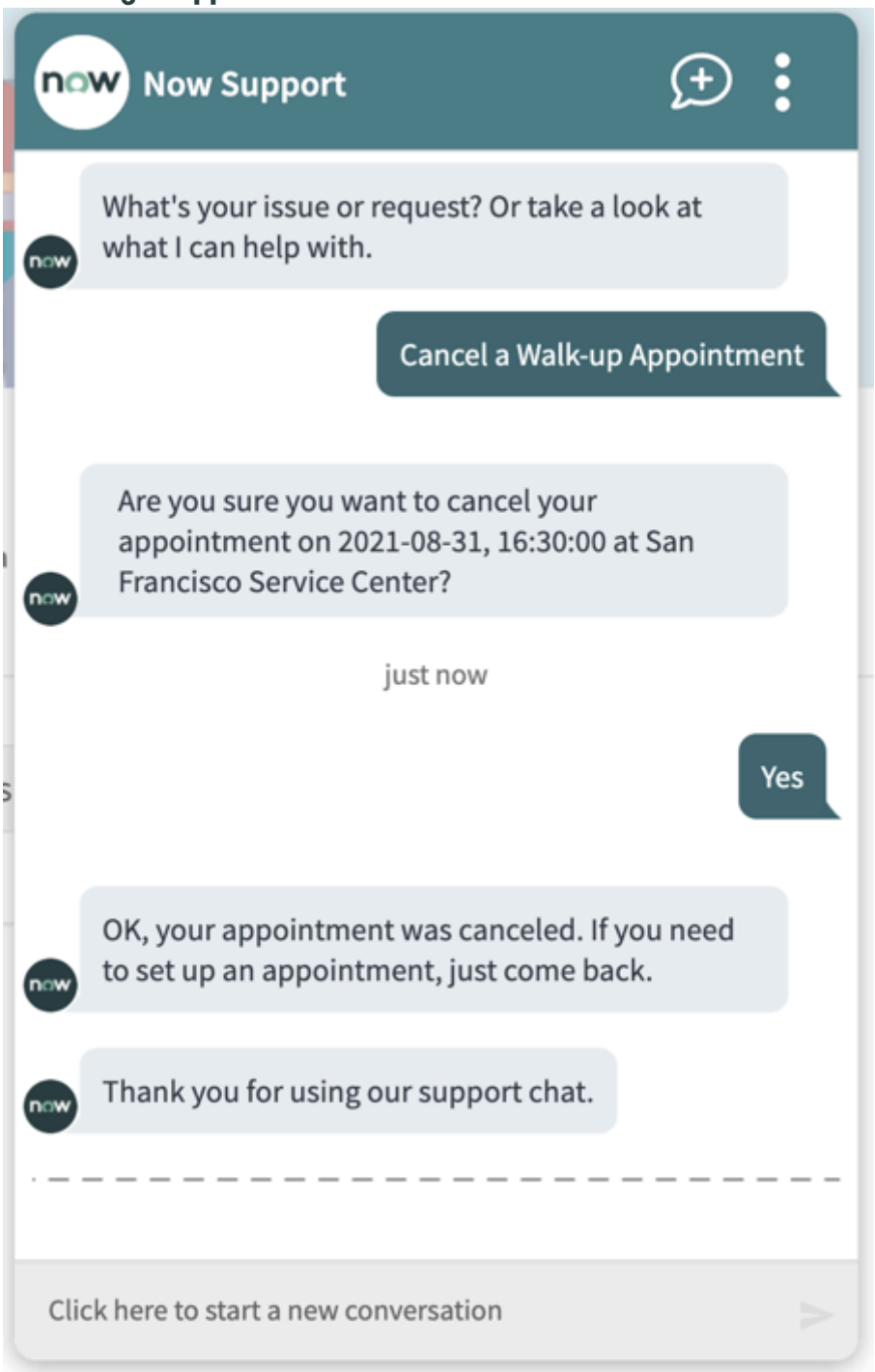
Cancelling an appointment



4. Confirm the cancellation.

Result

The appointment is canceled.

Related topics

Schedule an appointment

Reschedule an appointment

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Using Chat Zoom Connector

Initiate a Zoom meeting directly from a chat by using the Chat Zoom Connector application.

As an agent you can initiate a Zoom meeting from a chat to understand and resolve customer issues faster through live interactions. For more information, see Initiate Zoom meetings from chats.

By default, for each interaction record for a Zoom meeting, a Notify conference call number is also generated. As an agent, you or the agent manager can access the recording URL of the Zoom meeting from the activity stream of the interaction record.

As an agent manager, you can access the details of Zoom meetings initiated from a customer chat using the Zoom interaction record. The meeting recordings are available in the interaction record created for Zoom. For more information, see View details for Zoom meetings initiated from chats.

Note: The conference call details of a Zoom meeting are stored in the Notify Conference Calls [notify_conference_call] table.

As a user in the notify_admin or notify_view role, you can access the details of a Zoom meeting by navigating to **Notify** > **Recordings**, and selecting the corresponding conference call number. For more information, see Notify conference calls.

Chat Zoom Connector user roles

The users with the roles listed in the following table can use the Chat Zoom Connector application.

Roles required for Chat Zoom Connector

Roles	Tasks
agent_workspace_user	Initiate a Zoom meeting from a chat to understand customer issues and resolve issues faster through live interactions.
sn_customerservice_manager	View details for Zoom meetings initiated from a customer chat using the Zoom interaction record. The meeting recordings are available in the interaction record created for Zoom meetings.
notify_admin, notify_view	View details for Zoom meetings initiated from a customer chat by using Notify.

Activation information

Configure the Chat Zoom Connector application for initiating Zoom meetings from customer chats. For more information, see Configure Chat Zoom Connector.

Related topics

Chat Zoom Connector

Initiate Zoom meetings from chats

Resolve issues faster by initiating a Zoom meeting directly from a customer chat using the Chat Zoom Connector application.

Before you begin

Ensure that an administrator has installed and set up the Chat Zoom Connector application. For more information, see Configure Chat Zoom Connector.

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Role required: agent_workspace_user

About this task

You can use a Zoom meeting to host a screen-sharing or video conference. You can also record the meeting and save the recordings.

Procedure

1. Navigate to **Agent Workspace**.
2. Accept and respond to a chat from your agent inbox.
3. **Optional:** Ask questions and find out more about the issue.
4. To start a Zoom session with a customer, click the quick actions icon (), and then select **/ zoom**.

   Tip: You can also enter `/zoom` in the text field of the chat.

5. Click the send icon ().
   A message announcing that the Zoom meeting has started and one containing the meeting URL are posted in the chat window for both agent and customer. If the session was initiated through the Private Chat tab, the session's URL isn't shared with the customer.
6. Click the URL to host the Zoom meeting and request the customer to click the URL too.
   As a host of the meeting, you can admit participants by sharing the meeting URL with them. The number of participants you can admit depends on your Zoom account settings.

   The meeting topic is set to the number of the associated chat interaction record. The meeting description is set to the short description of the associated chat interaction record. If the short description of the associated chat interaction record is empty, the meeting description is shown as a dash (-).

7. **Optional:** Record the meeting.
   For more information, see the Zoom Help Center .

Result

An interaction record of type **Zoom** is generated for the meeting that captures the Notify conference call details for this Zoom session. A Notify administrator or agent manager can access the conference call details associated with the Zoom meeting from the interaction record.

Note: The conference call number is a value automatically generated in the **Channel Metadata Record** field on the Interaction form. For more information, see View details for Zoom meetings initiated from chats.

The recording URL of the Zoom meeting is added to the activity stream of the interaction record.

View details for Zoom meetings initiated from chats

View details for a Zoom meeting initiated from a chat by accessing the associated interaction record.

Before you begin

Role required: sn_customerservice_manager

About this task

This task provides steps for a user with the sn_customerservice_manager role to access Zoom meeting details from an interaction record. For information about how users with other Notify roles view Zoom meeting details, see Using Chat Zoom Connector.

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Procedure

1. Navigate to **Interaction** > **All**.
2. In the Interactions list, click the link to an interaction record of type Zoom from the **Number** column.

Result

The recording URL of the Zoom meeting, if available, is added as a work note and displayed in the activity stream of the Interaction form.

On the Interaction form, you can view the details for a Zoom meeting.

Note: Your administrator might have configured the interaction record to show different application-specific field values.

Interaction form

Field	Description
Number	Unique number to identify the interaction record.
Type	Type of channel communication. For a Zoom meeting, the field is automatically set to **Zoom**.
State	Different states through which the interaction proceeds for a resolution.
Opened for	Customer contact or consumer for whom the Zoom meeting was initiated. This field is automatically set to the **Opened for** field value from the chat interaction record from which the Zoom meeting was initiated.
Assigned to	Agent the interaction record is assigned to. This field is automatically set to the **Assigned to** field value from the chat interaction record from which the Zoom meeting was initiated.
Parent	Number of the chat interaction record from which this Zoom meeting was initiated. This field is automatically set to the number of the chat interaction record. You may need to configure the form to add this field. For more information, see Configure the form layout.
Channel Metadata Record	Number of the Notify conference call. This field is automatically set to a conference call number associated with this meeting and stored in the Notify Conference Calls [notify_conference_call] table. **Note:** To view more details such as the meeting URL and participant details, click the preview this record icon (ⓘ) for this field.

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Interaction form (continued)

Field	Description
	You may need to configure the form to add this field. For more information, see Configure the form layout.
Channel Metadata Table	Table containing a list of conference calls started using Notify. This field is automatically set to **Notify Conference Calls [notify_conference_call]**. You may need to configure the form to add this field. For more information, see Configure the form layout.
Consumer	Consumer's account automatically set to the **Consumer** field value from the chat interaction record from which the Zoom meeting was initiated. You may need to configure the form to add this field. For more information, see Configure the form layout.
Contact	Customer contact automatically set to the **Contact** field value from the chat interaction record from which the Zoom meeting was initiated. You may need to configure the form to add this field. For more information, see Configure the form layout.
Account	User's account automatically set to the **Account** field value from the chat interaction record from which the Zoom meeting was initiated. You may need to configure the form to add this field. For more information, see Configure the form layout.
Short Description	Short description of the interaction. **Note:** The short description field is empty for a Zoom meeting.

Related topics

Initiate Zoom meetings from chats

Using the Business Location Service Portal

Use the Business Location Service Portal (BLSP) available with the Customer Service Management (CSM) application as a one-stop shop to manage the internal and external organizations (formerly internal and external business locations).

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

As a user with the sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and admin role, you can use the Business Location Service Portal page to:

- Get a 360° view of a business location.
- Add and manage staff members.

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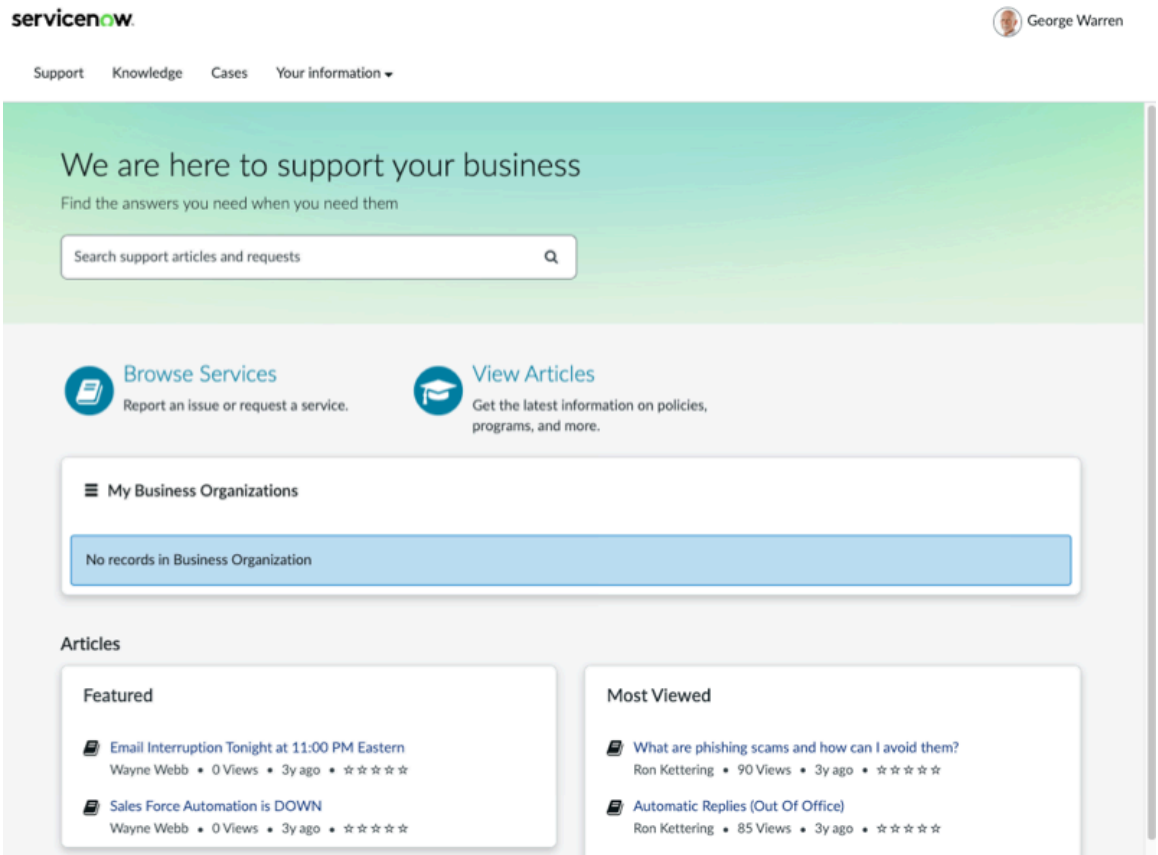
- Submit cases against business organizations (formerly business locations), sold products, or install base items deployed at a service organization.
- Access Knowledge Base articles and engage with the community.

Business Location Service Portal



From the Business Location Service Portal, you can access and use the following features:

Business Location Service Portal

UI component	Description
Support	Select **Support** to create a customer case.
Knowledge	Selecting **Knowledge** on the header takes you to the kb_home page. You can search the Knowledge Base or view a list of top-rated or most viewed Knowledge Base articles.
Cases	View the list of cases.

Your Information	View the list:
	• Business Organizations - Here, you can view the list of:
	  ○ Details
	  ▪ Organization number
	  ▪ Organization name
	  ▪ Manager name

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Business Location Service Portal (continued)

UI component	Description
	▪ City ▪ Street ▪ Parent Organization ○ Related Actions ▪ Create Case ▪ Add Member ○ Business Organization Details ▪ Cases Requested ▪ Members ▪ Products ▪ Install Base ▪ Child Business Organizations ▪ Child Business Locations ○ Cases Requested • Install Base- Here, you can view the list of: ○ Details ▪ Name ▪ Created ▪ Buyer Organization ▪ Buyer Organization Members ○ Related Actions ▪ Create Case ▪ Assign member **Note:** Only users assigned with the manager role within their respective buyer organization can assign members. Once assigned, the member is displayed in the Buyer organization member field. Confirm that the Buyer organization field is filled. ○ Affected Install Bases • Products ○ Details ▪ Product ▪ Buyer Organization ▪ Buyer Organization Member

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Business Location Service Portal (continued)

UI component	Description
	○ Related Actions ▪ Create Case ▪ Assign member **Note:** Only users assigned with the manager role within their respective buyer organization can assign members. Once assigned, the member is displayed in the Buyer organization member field. Confirm that the Buyer organization field is filled. ○ Child Sold Products ○ Product Information ○ Cases ○ Install Base
Notification	Displays notifications for case tasks with the following criteria • State is **Open**. • **Visible to customer** check box is selected. • User has the Location manager Contributor (sn_customerservice.svc_location_manager_contributor), or Service Organization Contributor roles (sn_customerservice.service_organization_contributor). • User is a member of the business location for which the case task is created. You can view only 7 notifications in the notification tab. To view all the notifications for a case task, select **View all notifications**.
Profile menu	Select your profile photo to either view your profile or log out.
Search	Enables you to search support articles and requests. Enter a search term and select **Search** to view the search results.
Browse Services	Select **Browse Services** to report an issue or request a service. Use the service to register a member at an external organization.
View Articles	Explore the knowledge base to get the information.
Ask the community	Provides access to the Community home page. You can use the community to ask

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Business Location Service Portal (continued)

UI component	Description
	questions and get answers, connect with people who share similar expertise, and join forums and participate in discussions.
My Business Organizations	Get the 360° view of the business location. Use the feature to: • Add a member to an external organization. • Report cases on behalf of a business location. • Report cases against sold products deployed at a business location. • Report cases against install base items deployed at a business location.
Featured Articles	View featured community content.
Most Viewed articles	View a list of the most viewed articles.

Depending on the configuration set by your administrator, you can perform the following tasks from the Business Location Service Portal:

- Register and assign staff members to a business organization
- Report cases on behalf of a business organization
- Report cases against sold products deployed at a business organization
- Report cases against install base items deployed at a business organization
- Access knowledge base articles and frequently asked questions

Related topics

Add staff members to a business organization in the Business Location Service Portal

Create cases for a business organization in the Business Organization Support Portal

Track cases on the Business Location Service Portal

Add staff members to a business organization in the Business Location Service Portal

Add users as staff members to a business organization to support accounts, contacts, consumers, and households.

Before you begin

Role required: admin, sn_customerservice_manager, sn_customerservice.svc_location_manager, sn_customerservice.svc_location_manager_contributor, and sn_bus_loc.location_relationship_manager

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

About this task

Add internal and external members to a business organization. You can add both internal users with the snc_internal role and external users with the snc_external role as staff members to an external organization (formerly external business location).

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- Administrators and customer service managers can add staff members to any business organization.
- Location managers can add staff members to the business locations that they have access to.

Note: As a user with the sn_customerservice.svc_location_manager role, you can create both internal and external staff members. However, as a user with the sn_customerservice.svc_location_manager_contributor role, you can only create external staff members.

Procedure

1. Navigate to **Home** > **Support** > **Services**.
2. Select **Register Member at External Organization** to open the Register Member at External Organization record.
   You can use the record to register new location staff or move existing staff between locations managed by the Location manager, and assign responsibilities to staff accordingly.
3. On the form, fill in the fields.

Register Member at the External organization form

Field	Description
External Business Location	The external business location. This field is automatically generated.
Register Staff	Field used to register new location staff or move existing staff from an external business location hierarchy between locations. ○ **New Staff**: Create a user in External Organization Staff (sn_csm_service_organization_external_staff) table with (snc_external) role. ○ **Existing Staff**: List of staff members already working under the service organization hierarchy.
First Name	First name of the staff member.
Last Name	Family name of the staff member.
User ID	User ID of the staff member.
Email	Email address of the staff member.
Member	Field used to select an external staff member from the list of external organization staff (formerly service organization external staff) record. **Note:** The **Member** field appears only when **Existing Staff** is selected from the **Register staff** field.
Member Type	Field used to assign responsibility for the selected business location.

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Field	Description
	○ **None**: Creates a member record. ○ **Listed Member**: Creates a member record. With the member record, a responsibility record is created with the type as Listed Member and the responsibility as empty. ○ **Location Contributor**: Creates a member record. With the member record, a responsibility record is created with the type as Location Contributor and responsibility as the Location Contributor. **Note:** Assigning responsibility is applicable to both existing and new staff members.

4. Select **Submit**.
   Additionally, the external organization record is created in the **Organization** field (formerly service organization field) of the External organization staff (formerly service organization external staff) [sn_csm_service_organization_external_staff] table.
   A new external staff member record is created for the selected external organization. The admin must assign responsibilities to the staff members. However, if you have selected **None** as a member type, then you must not create a responsibility record.

Result

Once a staff member is added to a business organization, the following details can be accessed from the **Business Location Details** tab:

- Cases Requested
- Members
- Accounts
- Consumers
- Products
- Install Base
- Projects

Related topics

Create cases for a business organization in the Business Organization Support Portal

Track cases on the Business Location Service Portal

Agent assistance for your business location staff

Customer service agents receive chat requests from your business location staff on the CSM Agent Workspace. These agents can assist your staff members to resolve issues and manage their cases more efficiently if your staff members fill out a pre-chat survey first.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

The customer service agents have visibility into the ongoing requests and case statuses. The agents can efficiently handle the issues from the staff members of a business location.

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After an agent accepts an incoming chat request, the **Requestor Organization** (formerly **Requesting service organization**) field on the Interaction form that the agent sees is automatically filled in with the business location that a staff member selected during the pre-chat survey. To learn more about the pre-chat surveys, see (Legacy) Define pre-chat survey configurations.

Note: The **Number**, **Type**,**State**, and **Assigned to** fields on the Interaction form are filled by default. To learn more about the fields, see Create cases for a business organization in the Business Organization Support Portal.

The Open Cases and Recent Interactions related lists on the Interaction form shows a list of the active cases and interactions for the requesting service organization.

A resolution is also provided by interacting with the user. For further assistance, an agent can create a case or link the discussion to an existing case. The **Requestor Organization** field is populated by default when a case is created from an interaction.

Related topics

Chat with Virtual Agent from the Business Location Service Portal

Create cases for a business organization in the Business Organization Support Portal

As a staff member with the location agent role, create and manage cases for your business organizations (formerly business locations) from the Business Organization Support Portal (formerly Business Location Service Portal).

Before you begin

Role required: admin, sn_customerservice.svc_location_agent, and sn_customerservice.svc_location_manager

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

About this task

Staff members with the location agent role can do the following:

- View information for the customers at their location.
- Create cases for an account, consumer, business organization, and themselves.
- Register staff members at an external organization.
- Track and update cases created at their location.

Procedure

1. Navigate to **Home** > **Business Location Support** > **Support** > **Create a Customer Case**.
2. On the form, fill in the fields.

Create a Customer Case form

Field	Description
Who are you creating this case for?	The record producer used for to create a case for the contributor user. When the contributor user selects an option, depending on the roles assigned to the logged-in user, additional fields related to that customer type are displayed.

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Field	Description
	○ **Account**: The logged-in user with the account contributor role. ○ **Consumer**: The logged-in user with the consumer contributor role. ○ **Business Location**: The logged-in user with the service organization contributor role. ○ **Myself**: The logged-in user with the self-contributor role.
Reported By	Auto-populated with the logged-in user.
Requesting Business Location	Name of the service organization requesting assistance.
Requesting support from Business Location	Name of the service organization from which the **Requesting Business Location** is asking assistance.
Account	Name of the account.
Contact	Contact for the account.
Consumer	Name of the consumer. **Note:** This field is active only when the B2B2C plugin is installed.
Household	Household that the consumer belongs to.
Product	Sold product associated with the case.
Install Base	Install base item associated with the case.
Priority	The assigned priority: ○ 1 — Critical ○ 2 — High ○ 3 — Moderate ○ 4 — Low (default)
Channel	Method by which the customer initiated contact and opened the case. ○ Web (default) ○ Phone ○ Email ○ Chat ○ Social ○ Community ○ Alert ○ Virtual Agent ○ In Person

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Field	Description
Subject	Subject line specifying the case.
Description	Brief description of the customer question, issue, or problem.

3. Select **Submit**.

What to do next

Similarly, you can report cases on behalf of a business location, against sold products deployed at a business organization, or installed base items deployed at a business organization.

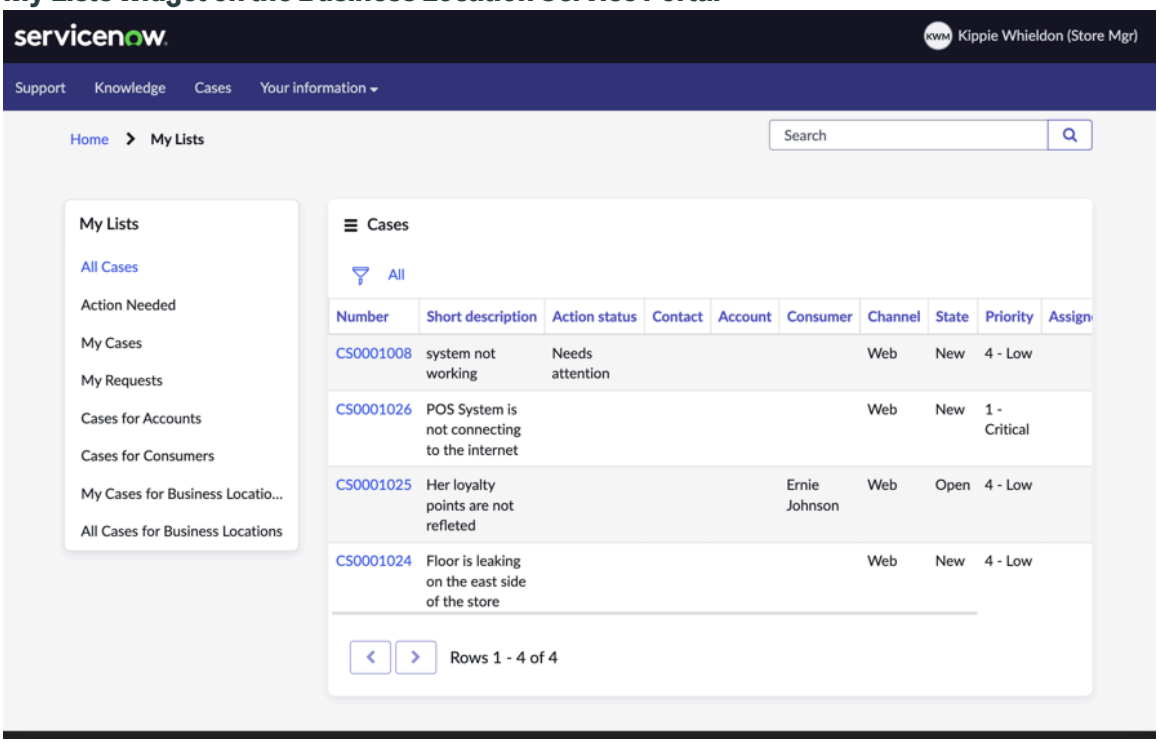
Related topics

Track cases on the Business Location Service Portal

Track cases on the Business Location Service Portal

Track cases on behalf of a business location against sold products deployed at a business location, or against installed base items deployed at a business location.

My Lists widget on the Business Location Service Portal



Depending on the roles assigned to the logged-in user, the widget displays the following filters.

My Lists widget filters

My Lists filters	Description
All Cases	List of all the cases.
Action Needed	Cases in the **Resolved** state that are waiting for a customer response.
My Cases	Cases for myself.
My Requests	Cases that are created as a request.

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My Lists widget filters (continued)

My Lists filters	Description
Cases for Accounts	Cases created by the account contributor.
Cases for Consumers	Cases created by the consumer contributor.
My Cases for Business Locations	Cases created by the contributor user on behalf of their business locations.
All Cases for Business Locations	All cases created on behalf of the contributor users' business locations, independent of who created the case.

Track work orders on the Business Location Service Portal

Enable your location staff to track work orders for their business locations using the Business Location Service Portal (BLSP). It enables you to view and manage work orders, helping you track tasks and updates directly related to your specific locations.

Before you begin

Role required: admin, sn_customerservice.service_organization_contributor, sn_customerservice.svc_location_manager_contributor, sn_bus_loc.location_relationship_manager, or sn_customerservice.svc_location_manager

Note: To access the complete work order functionality, a sn_fsm_servicedesk_agent role is added to the sn_customerservice.service_organization_contributor role.

About this task

Work orders are requests for off-site work. Users with the appropriate roles create the work orders and provide the necessary information needed for the work order tasks. These orders include information about the requested services, including customer names and addresses, the work locations, and any related configuration items. Each work order includes one or more tasks that contain specific details about the work to be performed, such as required agent skills or part requirements.

For more information about work orders, see Manage work orders.

Procedure

1. Navigate to **Home** > **Your Information** > **Business Locations**.
2. On the Business Location Details page, select the business location that you want to track the work order for.
3. From the list of work orders at your business location, select a work order number to view its details, including location, activity, and tasks.

   Note: External location contributors can't access the **Work Order Tasks** tab.

Track customer orders on the Business Location Service Portal

Enable your location staff to track customer orders for their business locations using the Business Location Service Portal (BLSP). The portal enables them to view and monitor order details like order status, account, and channel partner information, helping them stay updated on customer activity for specific locations.

Before you begin

Role required:

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- sn_bus_org_orm.org_b2b_sales_rep
- sn_bus_org_orm.org_b2c_ sales_rep
- sn_bus_org_orm.org_sales_mgr
- sn_bus_org_orm.org_relationship_mgr
- sn_bus_loc.org_sales_mgr, or
- sn_bus_org_orm.org_ui

Procedure

1. Navigate to **Home** > **Your Information** > **Customer Orders**.
   The page displays a list of customer orders associated with the business locations.
2. From the list, select a customer order number to view its details.
   For a description of the fields, see Customer Orders form

   You can also access Customer orders by navigating to **Home** > **Your Information** > **Business Locations**.

Related topics

Customer Orders form

Track opportunities on the Business Location Service Portal

Enable your location staff to track opportunities for their business locations using the Business Location Service Portal (BLSP). The portal enables them to view opportunities and any activity performed on them.

Before you begin

Role required: For details on roles, see Roles.

Procedure

1. Navigate to the business location service portal.
2. Select **Your Information** > **Opportunities**.
   The page displays a list of all the opportunities.
3. From the list, select an opportunity to view its details.
   You can access opportunities specific to a business location by navigating to **Home** > **Your Information** > **Business Organizations** and then selecting **Opportunities**.

Track and update projects

Enable your location staff to track projects for their business locations using the Business Location Service Portal (BLSP). You can manage projects, enabling efficient monitoring of progress and updates of your locations.

Before you begin

Role required: admin, sn_bus_loc.location_project_stakeholder, sn_customerservice.service_organization_contributor, sn_customerservice.svc_location_manager_contributor, sn_bus_loc.location_relationship_manager, and sn_customerservice.svc_location_manager

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Procedure

1. Navigate to **Home** > **Your Information** > **Business Organizations**.
2. On the Business Location Details page, select the business location that you want to track the projects for.
3. See the list of projects by selecting the **Projects** tab.
4. **Optional:** Create a case for the business location or account or consumer by selecting **Create Case**.
5. Register a staff member to the business location by selecting **Add Member**.
   To learn more, see Add staff members to a business organization in the Business Location Service Portal.
6. To see **Project Tasks**, **Sub-Projects** and **Cases**, select a project.
7. To update a task, select a task from the list.
   Dates, state, tasks, and cases can be updated.
8. **Optional:** Mark a task as completed by selecting **Mark Complete**.
   State and **Actual end date** is updated automatically.

Track outages and install base service health on BOSP

Enable your business organization staff to view outage information affecting their install base items directly on the Business Organization Support Portal (BOSP).

Before you begin

Role required: sn_customerservice.svc_location_manager_contributor, sn_bus_loc.business_org_consumer_contributor, or sn_bus_loc.business_org_account_contributor

Procedure

1. Log in to the Business Organization Support Portal (BOSP).
2. If an outage affects an install base item belonging to your business organization, an outage banner is displayed on the home page, indicating that there is an outage for that install base item.
3. In the outage banner, select:
   - the install base item number to view the install base item details. The outage banner is also displayed on the install base item's details page. Scroll to the bottom to view the health status of an install base item.
   - Select the related case id in the banner to view the case details.
4. **Optional:** Navigate to **Your Information** > **Install Base** and open an install base item from the list.
   The outage banner is also displayed on the install base item's details page.

Result

You can view outage details and the related case for your business organization's affected install base items, giving you visibility into service disruptions before you need to report them.

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Analytics and reporting for Customer Service Management

Customer Service Platform Analytics Solutions contain preconfigured dashboards with actionable data visualizations to improve your business processes and quantify the value of self-service.

Customer Service Platform Analytics and Reporting Solutions

Customer Service Platform Analytics Solutions contain preconfigured dashboards with actionable data visualizations to improve your business processes.

Platform Analytic and Reporting Solutions for Self-Service Analytics for Customer Service

Platform Analytics Solutions contain prepackaged Performance Analytics and Reporting content for use with other ServiceNow AI Platform products. This Platform Analytics Solution quantifies the value of self-service using the Self-Service Analytics dashboard for customer service.

Customer Service Platform Analytics Solutions

Customer Service Platform Analytics Solutions contain preconfigured dashboards with actionable data visualizations to improve your business processes.

Platform Analytics data visualizations use Performance Analytics indicator data to show you data over time, helping you analyze your business processes and identify areas of improvement. With Platform Analytics Solutions, you can get value from Performance Analytics for your application with minimal setup. You can always create your own objects as well.

To access available dashboards, navigate to **Performance Analytics** > **Dashboards** and select **All**.

Two Platform Analytics Solutions are available for Customer Service:

- Customer Service (com.snc.pa.customer_service)
- Customer Service Management - Advanced (com.snc.pa.customer_service_advanced)

Note: Customer Service Performance Analytics solutions are an optional feature available for the Customer Service Management application. To use them, your license must also include Performance Analytics. Once licensed, enable the Performance Analytics Premium for Customer Service and the Customer Service Performance Analytics solutions on the instances where you wish to leverage the enhanced functionality. For more information about licensing Performance Analytics, see Activating your Performance Analytics subscription.

Customer Service solution

The Customer Service solution adds the following features.

Note: Performance Analytics - Spotlight (com.snc.pa.spotlight) is automatically activated with this solution.

Spotlight groups: Case Spotlight.

Dashboards:

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- Customer Service Agent
- Customer Service Manager

Customer Service Management - Advanced solution

The Customer Service Management - Advanced solution adds the following features.

Note: Performance Analytics - Spotlight (com.snc.pa.spotlight) is automatically activated with this solution.

Spotlight groups: Case Spotlight.

Dashboards:

- Customer Service Agent - Advanced
- Customer Service Manager - Advanced

These dashboards have all the information shown on the dashboards for the basic Customer Service solution, but also contain additional indicators for the following features. Activate all the plugins below in order to view the additional indicators.

- Major Issue Management
- Customer Service Case Action Status
- Customer Service with Request Management
- Customer Service with Service Management
- Agent Chat
- Advanced Work Assignment for CSM
- Performance Analytics - Content Pack - Advanced Work Assignment

Note: For more information about the Major Issue Management indicators, see Major issue management analytics.

The Customer Service Management - Advanced solution also adds additional Service Management indicators to the Analytics Hub. For more information, see Customer Service Management integration with Service Management analytics.

Enable Performance Analytics for Customer Service Management

To enable Performance Analytics for Customer Service Management, a user with the admin role can navigate to **Performance Analytics** > **Guided Setup**. Click **Get Started** and then scroll to the section for Customer Service. The guided setup takes you through the entire setup and configuration process.

Related topics

Ranking records with Spotlight

Customer Portal Usage dashboard

The Customer Portal Usage dashboard enables you to understand the user usage of portals by presenting an aggregate count of sessions created every month.

These sessions don't represent individual users. For example, if you access the portal on two different days, it counts as two separate sessions. For more information about how an aggregate session is counted, see Usage calculation of self-service experiences.

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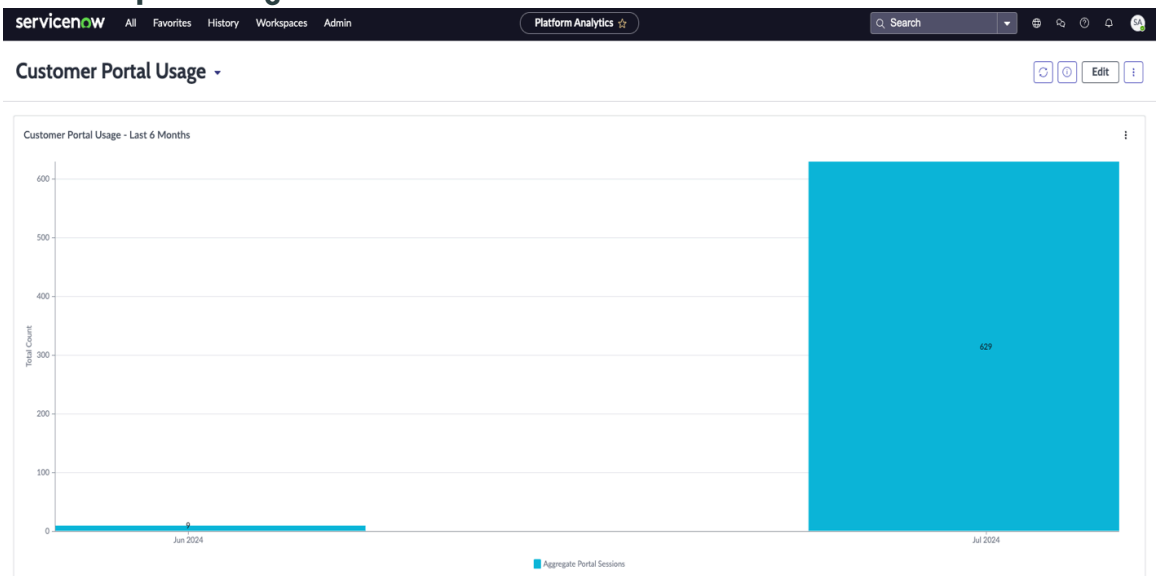
You can access the dashboard by navigating to **All** > **Self Service** > **Dashboards**. On the dashboard page, search and select `Customer Portal Usage`.

To access more detailed information, place your mouse device over any of the graphical reports. These graphs can be saved as PNG or JPEG files, enabling you to add them to emails or include them in your presentations. Additionally, all graphs can be updated to display the current data. An example of the dashboard layout is shown in the following image.

Note: The Customer Portal usage tab is available when the Case Management Core (com.sn_customerservice) plugin is activated.

Customer portal usage dashboard



End user and roles

End user and goal	Required role
Administrator: • Can edit the data • Can view the dashboard	admin

Required definitions for Customer Portal Usage dashboard

Definitions	Description
DEFN1003689	Get all the guest portal session counts for yesterday. Frequency: Daily **Note:** Login pages are excluded from guest usage calculations.
DEFN1003690	Get all the bot portal session counts for yesterday.

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Definitions	Description
	Frequency: Daily
DEFN1003691	Get all the external user portal session counts for yesterday. Frequency: Daily
DEFN1003724	Get aggregated chargeable external portal sessions for last month. Frequency: Monthly

Related topics

Usage calculation of self-service experiences

Customer Service Agent dashboard

The Customer Service Agent dashboard provides quick access to your cases based on criteria that help you prioritize your work. The dashboard also displays summary data on metrics for your organization.

To view the Customer Service Agent dashboard, navigate to **Performance Analytics** > **Dashboards**. Click the **All** tab and select **Customer Service Management** from the Group menu. Click the **Customer Service Agent** or **Customer Service Agent - Advanced** tile.

The Customer Service Management - Advanced Performance Analytics Solution adds the Customer Service Agent - Advanced dashboard. The Advanced dashboard contains two additional indicators: Exceeding Chat Target and Exceeding Case Target.

End users and roles

The Customer Service Agent dashboard includes the following end users and roles.

Agent dashboard end users and roles

End user and goal	Required role
Customer service agent: View and prioritize your assigned cases. View case trends for all agents.	sn_customerservice_agent
Customer service manager: View and prioritize your assigned cases. View case trends for all agents.	sn_customerservice_manager
Content administrator: Can edit the dashboard and manage users, groups, and roles for the dashboard.	pa_admin
Content creator: Can view the dashboard.	pa_viewer

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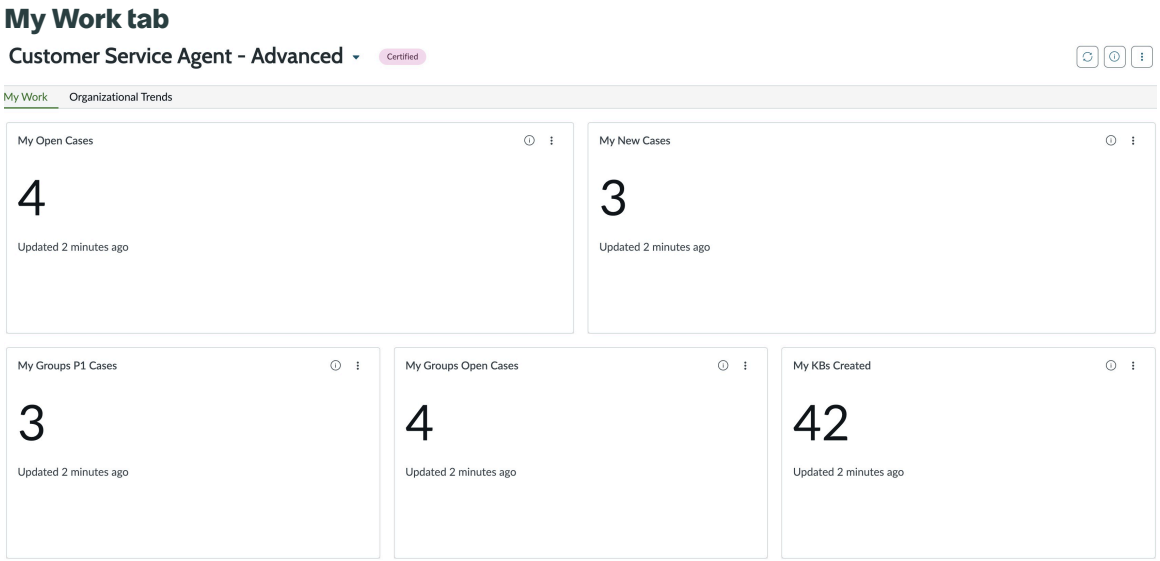

Reports

The Customer Service Agent dashboard includes the following reports.

Agent dashboard reports

Title	Description
My Open Cases	Cases assigned to me that are not resolved, closed, or canceled.
My Cases With Problems	Cases assigned to me that are part of a parent case that is assigned to a system admin. **Note:** To view this data in the dashboard, add the sn_problem_read role to the sn_customerservice_agent role.
My New Cases	Cases that I have not yet responded to.
My Group's P1 Cases	P1 cases that are assigned to a member of my group.
My Group's Open Cases	Cases assigned to a member of my group that are not resolved, closed, or canceled.
My KBs Created	List of all KB articles that I created.

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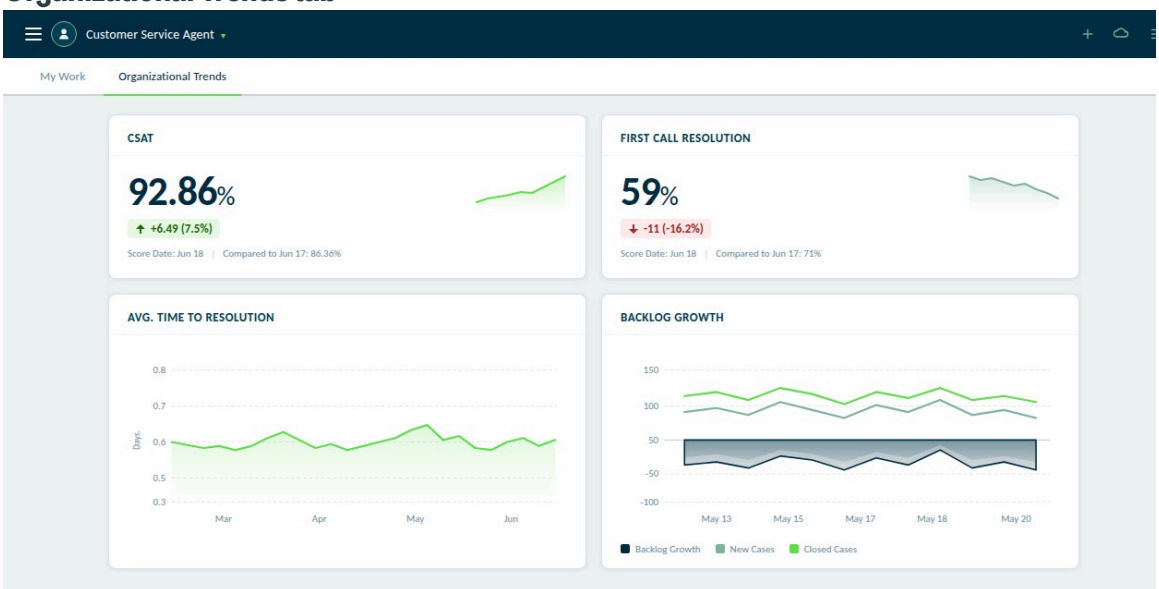
Organizational Trends tab



Indicators

The Customer Service Agent dashboard includes the following indicators.

Agent dashboard indicators

Indicator	Description
CSAT	Average customer satisfaction based on survey results. The percent change in the current period appears under the total percentage. For more information about CSAT, see Customer service satisfaction surveys.
First Call Resolution	Percentage of cases that were resolved during first contact with the customer. The percent change in the current period appears under the total percentage.
Exceeding Chat Target	Percentage of all Chat work items that have exceeded the target wait time. For more information about the Chat service channel, see Advanced Work Assignment service channels **Note:** This indicator is only viewable on the Customer Service Agent - Advanced dashboard.
Exceeding Case Target	Percentage of all Case work items that have exceeded the target wait time. For more information about the Case service channel, see Advanced Work Assignment service channels **Note:** This indicator is only viewable on the Customer Service Agent - Advanced dashboard.
Avg. Time to Resolution	Average time for a case to be marked as closed or resolved. **Note:** On the Customer Service Agent - Advanced dashboard, this indicator is called Mean Time to Resolve.
Backlog Growth	Number of backlogged cases for all agents over time.

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Customer Service Manager dashboard

The Customer Service Manager dashboard displays charts and summary data on metrics like backlog, resolution rates, SLA, customer satisfaction, and per-agent KPIs.

To view the Customer Service Manager dashboard, navigate to **Performance Analytics** > **Dashboards**. Click the **All** tab and select **Customer Service Management** from the Group menu. Click the **Customer Service Manager** or **Customer Service Manager - Advanced** tile.

The Customer Service Management - Advanced Performance Analytics Solution adds the Customer Service Manager - Advanced dashboard. The Advanced dashboard contains the additional tab Work Assignment Analytics.

End users and roles

End user roles and goals

End user and goal	Required role
Customer service manager: View case metrics like backlog, resolution rates, SLA, customer satisfaction, and per-agent KPIs to understand the current performance of customer service at your organization.	sn_customerservice_manager
Content administrator: Can edit the dashboard and manage users, groups, and roles for the dashboard.	pa_admin
Content creator: Can view the dashboard.	pa_viewer

Dashboard breakdowns

The Customer Service Manager dashboard uses the Case Assignment Group breakdown. Select one or more groups to view data for only those groups. By default, data from all groups is shown on the dashboard.

Overview indicators

Customer Service Manager - Advanced indicators

Indicator	Description
CSAT	Average customer satisfaction based on survey results. The percent change in the current period appears under the total percentage. For more information about CSAT, see Customer service satisfaction surveys.
First Call Resolution	Percentage of cases that were resolved during first contact with the customer. The percent change in the current period appears under the total percentage.
Mean Time to Resolve	Average time for a case to be marked as closed or resolved. The percent change in the current period appears under the total percentage.
Customers Impacted by Major Case	Number of customers impacted by major cases.
Child Cases Auto Created	Percentage of child cases that are automatically created from a major case.

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Customer Service Manager - Advanced indicators (continued)

Indicator	Description
from Major Case	
Open Backlog - Blocked	Number of cases that are blocked and are not resolved.
Open Backlog - Unblocked	Number of cases that are not blocked and are not resolved.
Backlog Growth	Number of backlogged cases for all agents over time.

Customer Service Manager indicators

Indicator	Description
CSAT	Average customer satisfaction based on survey results. The percent change in the current period appears under the total percentage. For more information about CSAT, see Customer service satisfaction surveys.
First Call Resolution	Percentage of cases that were resolved during first contact with the customer. The percent change in the current period appears under the total percentage.
Open Cases with Breached SLAs	Percentage of cases that have remained open past the time required by the Service Level Agreement (SLA).
Unassigned Open Cases	Number of open cases that are not assigned to an agent.
Avg. Time to Resolution	Average time for a case to be marked as closed or resolved. The percent change in the current period appears under the total percentage.
Backlog Growth	Number of backlogged cases for all agents over time.
Open Case Backlog	Chart of cumulative open cases and case age over time.
Open Backlog	Number of cases that are not resolved.

Analysis indicators

Customer Service Manager analysis indicators

State	Indicator	Description
Open Backlog - Unblocked	% Not Updated in 5 Days	Percentage of open cases that agents have not updated within the last 5 days.
	% Marked as Major	Percentage of open cases that are major.

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Customer Service Manager analysis indicators (continued)

State	Indicator	Description
	% with Breached SLAs	Percentage of open cases that have remained open past the time required by the SLA.
	% with Priority P1	Percentage of open cases that are critical priority.
	% Escalated	Percentage of open cases that have been escalated.
	% with Problem	Percentage of open cases connected to a problem.
	% Agent Reassignment	Percentage of open cases where the Assigned to field has changed at least once.
	% of Major Candidates	Percentage of open cases that have been proposed as major case candidates.
	% Re-opened At Least Once	Percentage of open cases where the State was previously Resolved.
	% with Request	Percentage of open cases connected to a request.
Resolved or Closed	% with Problem	Percentage of closed cases connected to a problem.
	% Caused by Change	Percentage of closed cases caused by a change.
	Closed in Same Day	Number of cases that were closed on the same day they were created.
	% Re-opened At Least Once	Percentage of closed cases that were reverted to the open State at least once.
	% Resolved Major Cases	Percentage of closed cases that are major cases.
	% Re-assigned	Percentage of closed cases that are reassigned.
	% with Breached SLAs	Percentage of closed cases that remained open past the time required by the SLA.
	% with Change	Percentage of closed cases connected to a problem.
	% with Incident	Percentage of closed cases connected to an incident.
	% with Request	Percentage of closed cases connected to a request.

Analysis breakdowns

Select a breakdown to view cases grouped by that breakdown.

Cases in the Open Backlog - Unblocked state can be grouped by the following breakdowns.

- Case Assignment Group
- Case Assigned To
- Account
- Product
- State
- Priority

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- Category
- Channel

Cases in the Open Backlog - Blocked state can be grouped by the following breakdowns.

- Blocked Action Status
- Case Assignment Group

Cases in the Resolved or Closed state can be grouped by the following breakdowns.

- Case Assignment Group
- Case Assigned To
- Account
- Product
- Age
- Priority
- Category
- Contact

Case Spotlight breakdowns

Select values for the breakdowns to filter the data shown on the dashboard.

- Assignment Group
- Case State
- Case Priority
- Opened

Case Spotlight reports

Customer Service Manager case spotlight reports

Title	Description
Cases Above Spotlight Threshold	Number of cases that exceed the Case Spotlight threshold. Every case where **State** is New, Open, or Awaiting info is scored based on priority and last updated date. The score is compared against the threshold value to put cases with high priority in the spotlight. **Note:** You can edit the Case Spotlight spotlight group threshold and criteria to put different types of cases in the spotlight based on your organization's needs.
Spotlight Cases P1 - Critical	Number of cases that exceed the Case Spotlight threshold and are Priority 1.
Spotlight Cases - Unassigned	Number of cases that exceed the Case Spotlight threshold and are not assigned to an agent.

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Customer Service Manager case spotlight reports (continued)

Title	Description
Case Spotlight	List of cases that exceed the Case Spotlight threshold.

Agent analysis indicators

Customer Service Manager agent analysis indicators

Indicator	Description
Avg. Time to Resolution	Average time for a case to be marked as closed or resolved for each agent. Ranked from fastest to slowest. **Note:** On the Customer Service Manager - Advanced dashboard, this indicator is called Mean Time to Resolve.
First Call Resolution	Percentage of cases for each agent that were resolved during first contact with the customer. Ranked from highest to lowest.
CSAT	Average customer satisfaction for each agent based on survey results. Ranked from highest to lowest. For more information about CSAT, see Customer service satisfaction surveys.
Agent Efficiency Trend (Mean Time to Resolve)	Average time for a case to be marked as closed or resolved for each agent shown over time.
Closed Cases by Agent and Account.	Number of cases closed by each agent for each account.

Work Assignment Analytics reports

Customer Service Manager work assignment analytics reports

Report	Description
Average Chat Wait Time - Last Hour	Average amount of time that customers have spent waiting for an agent response in the past hour for chat work items.
Average Case Wait Time - Last Hour	Average amount of time that customers have spent waiting for an agent response in the past hour for case work items.

Work Assignment Analytics indicators

Customer Service Manager work assignment analytics indicators

Indicator	Description
Exceeding Target Work Items	Percentage of all work items that have exceeded the target wait time.
Assigned Work Items	Percentage of all work items that are assigned to agents.

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Customer Service Manager work assignment analytics indicators (continued)

Indicator	Description
Abandoned Work Items	Percentage of all work items that agents have abandoned.

Proactive Customer Service - Advanced dashboard

The Proactive Customer Service - Advanced dashboard helps customer service managers track key performance indicators (KPIs) to understand how proactive they were in identifying and communicating issues that impact customers. The dashboard also enables customer service managers to assess the business impact of outages over time. Install the Proactive Customer Service Advanced Dashboard plugin (com.snc.pa.customer_service_advanced) to view and monitor the advanced dashboards.

Important: Starting with the Xanadu release, the Proactive Customer Service- Advanced dashboard has a new, modernized look and feel.

To access the new Proactive Customer Service- Advanced dashboard, navigate to **All** > **Platform Analytics** > **Library** > **-Dashboard**, and select the Proactive Customer Service- Advanced dashboard. Upgrade customers can view the Proactive Customer Service Operations dashboard but should use the new Proactive Customer Service - Advanced dashboard.New customers on the Orlando and later releases can only view the Proactive Customer Service - Advanced dashboard.

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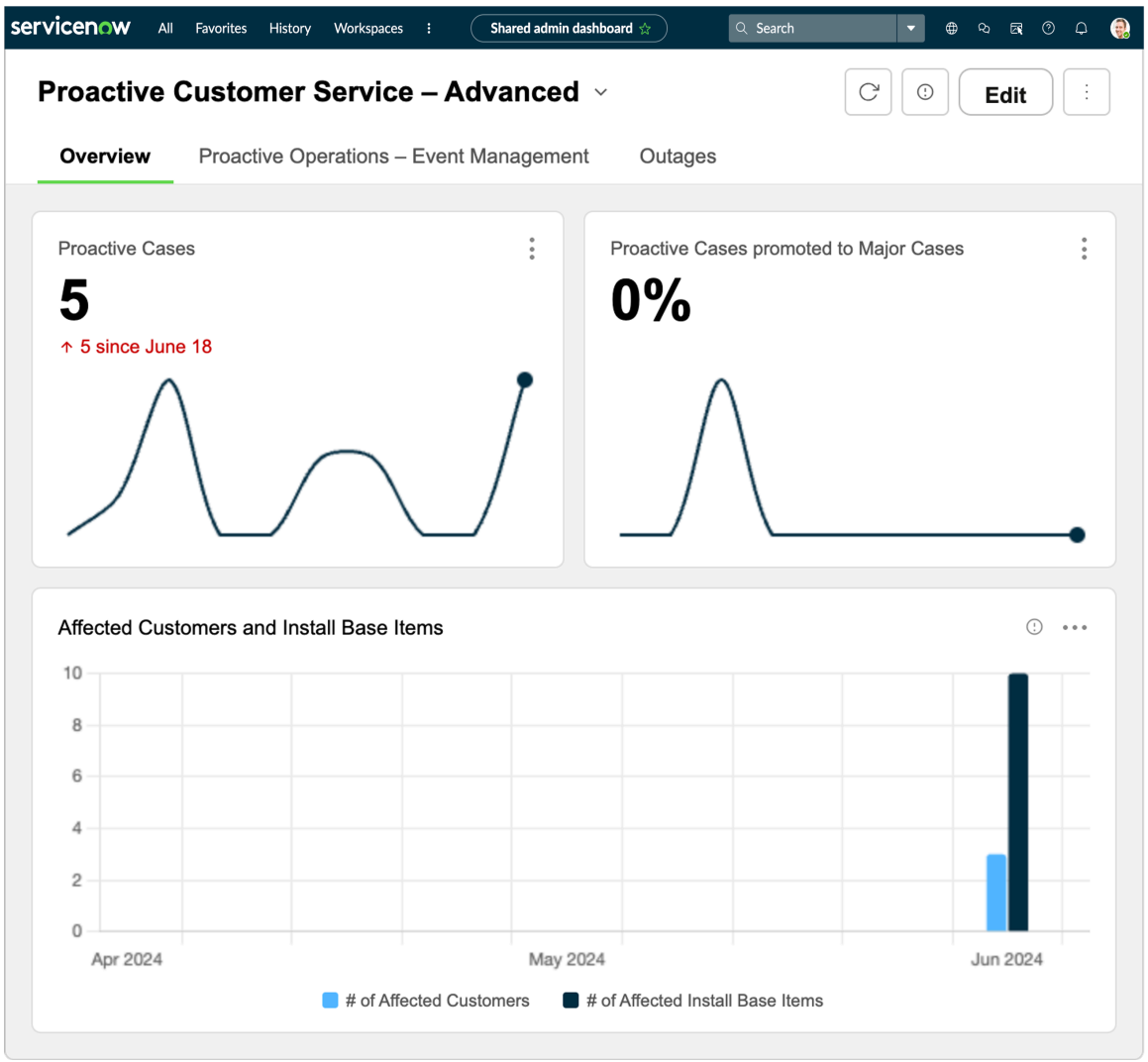
Overview tab



Proactive Operations - Event Management tab

Note: The Proactive Operations - Event Management tab is only visible if the Proactive Customer Service Operations plugin (com.snc.proactive_cs_itom) is activated.

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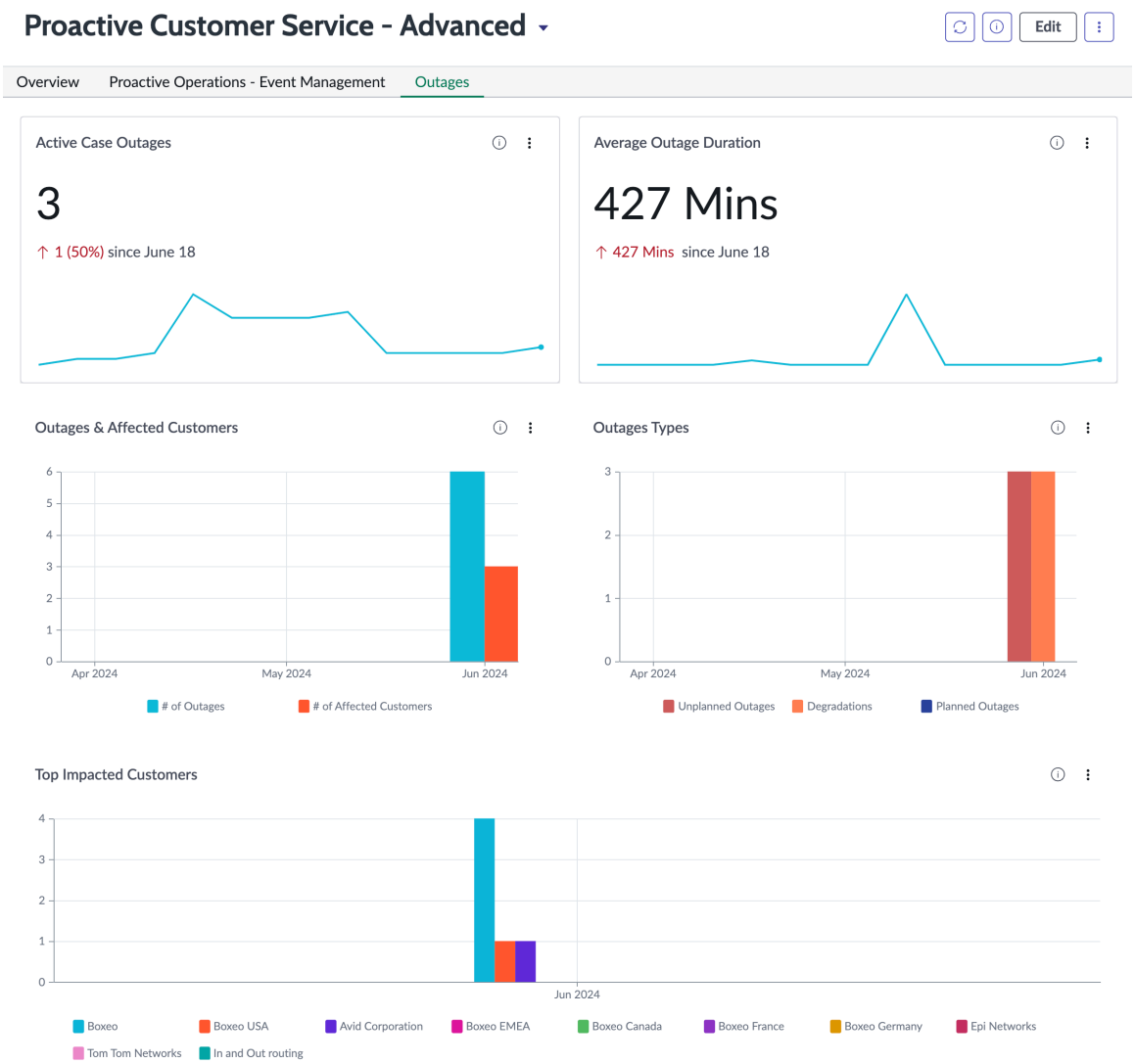
Outages tab



End user and roles

Advanced dashboard access by user role

End user	Required role	Benefits
Customer Service Manager	sn_customerservice_manager	Can view the dashboard.
Content administrator	pa_admin	Can edit the dashboard and manage users, groups, and roles for the dashboard.
Content creator	pa_viewer	Can view the dashboard.

Indicators

The Proactive Service - Advanced dashboard provides the following key performance indicators:

Proactive Cases

Number of active cases with critical and acknowledged alerts.

Proactive Cases Promoted to a Major Case

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Percentage of proactive cases promoted to a major case.

Affected Customers and Install Base Items

Number of customers affected per month.

Alerts that led to Proactive Case

Percentage of critical or acknowledge alerts that triggered case creation.

Active Case Outages

Number of active case outages per day.

Average Outage Duration

Average outage duration per day.

Outages and Affected Customers

Number of outages and affected customers per month.

Outages Types

Number of outages for each outage type per month.

Top Impacted Customers

Customers most impacted by outages.

Breakdowns

The following breakdowns apply to the indicators on the dashboard:

- # of Affected Customers
- # of Affected Install Base Items
- # of Outages
- Planned Outages
- Unplanned Outages
- Degradations

Customer Service Management integration with Service Management analytics

The Customer Service Management - Advanced Performance Analytics solution provides indicators for incident, problem, change, and request records associated with customer service cases.

The Customer Service Management - Advanced Performance Analytics solution adds additional indicators. Some of these indicators are automatically displayed on the Customer Service Manager dashboard in the Analysis tab. All the indicators can be viewed in the Analytics Hub or can be manually added to a dashboard.

Note: To view the indicators, you must activate the Customer Service with Service Management plugin (com.sn_cs_sm) and the Customer Service with Request Management plugin (com.sn_cs_sm_request).

Incident indicators:

- Number of Open Cases with Incident
- Number of Closed Cases with Incident

Problem indicators:

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- Number of Open Cases with Problem
- Number of Closed Cases with Problem

Change indicators:

- Number of Open Cases with Change
- Number of Closed Cases with Change

Request indicators:

- Number of Open Cases with Request
- Number of Closed Cases with Request

Caused By Change indicators:

- Number of Open Cases Caused By Change
- Number of Closed Cases Caused By Change

To view the indicators in the Analytics Hub, navigate to **Performance Analytics** > **Analytics Hub** and search for any of the above indicators.

To add an indicator to a dashboard, a user with the role pa_admin can navigate to the desired dashboard and then click the **Add Widgets** icon at the top right of the dashboard. Select **Performance Analytics** from the drop down menu, then click **Insights** in the list below. Search for the indicator using the search bar. Click the indicator, and then click **Add**.

Service Manager dashboard

Use the Service Manager dashboard to track and analyze customer service case data.

To view the Service Manager dashboard, navigate to **Customer Service** > **Overview**.

Important: Navigating to Customer Service Overview to display the Service Manager dashboard may result in an error. Users with the admin role can update the link for the Overview module using the following steps:

1. Select the Edit Module icon on the Overview module.
2. Select the Link Type tab on the Overview Module record.
3. Replace the link in the **Arguments** field with the following text:

   `now/platform-analytics-workspace/dashboards/params/edit/false/tab-sys-id/cfd42b49713354023ee53ca6498cb5d7/sys-id/06e36279f3d8b8349c285a79155206f8`

4. Select **Update**.

The Service Manager dashboard displays four case-related reports, which are created using the Reports application. You can drill down into these reports for more information about the related cases.

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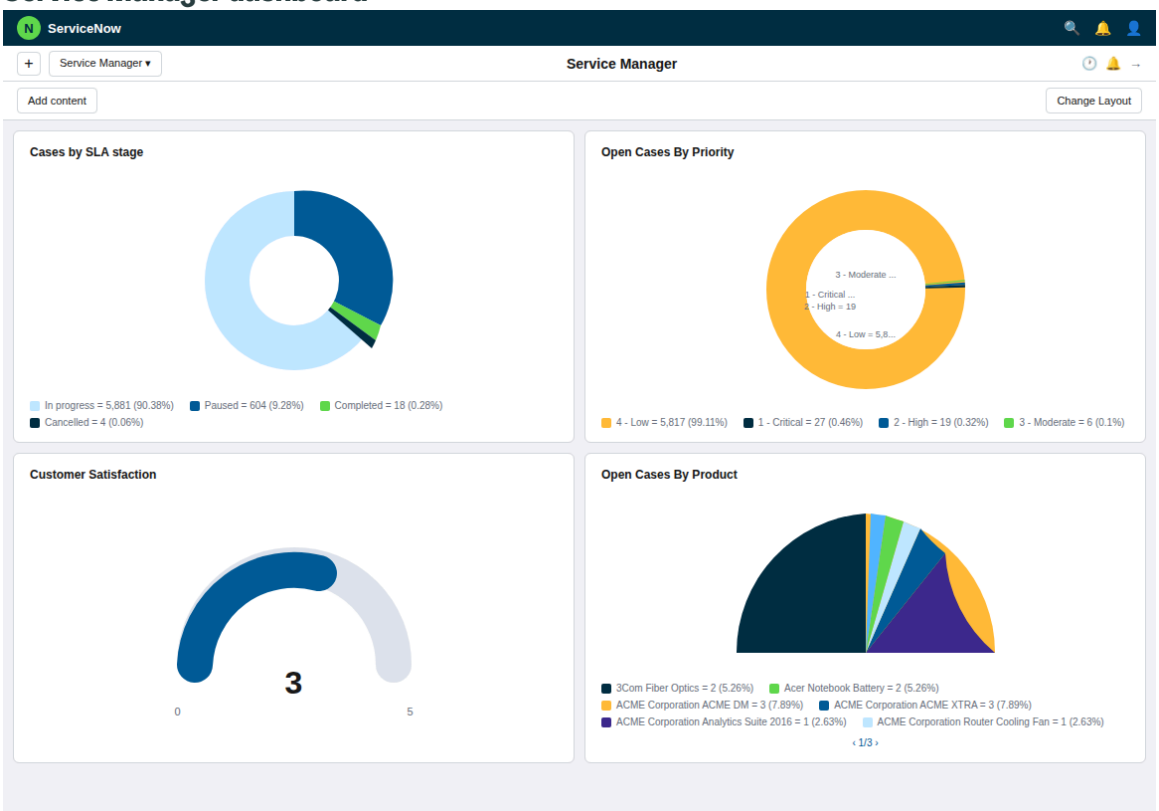
Service Manager dashboard



End users and roles

Dashboard access by role

End user and goal	Required role
Customer service manager: Track status of cases and customer satisfaction.	sn_customerservice_manager
Customer service agent: Track status of cases and customer satisfaction.	sn_customerservice_agent
System administrator: Can edit the dashboard.	admin

Reports

Dashboard report types

Title	Type	Description
Cases by SLA stage	Pie Chart	Displays the number of cases by SLA stage.
Open Cases By Priority	Donut	Displays the number of open cases by priority.

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Dashboard report types (continued)

Title	Type	Description
		• Click a priority to show the case list. • Click a case from the list to view details.
Customer Satisfaction	Gauge	Displays the results of the customer satisfaction survey that a customer is asked to take after a case is closed.
Open Cases By Product	Semi-Donut	Displays the number of open cases for each product.

Major issue management analytics

Provides indicators on the Customer Service dashboards for major cases and child cases.

Action indicators are available on the Customer Service dashboards when the Performance Analytics - Content Pack - Customer Service Management - Advanced plugin (com.snc.pa.customer_service_advanced) is activated.

Note: Activate the Major Issue Management plugin (com.sn_majorissue_mgt) to view the related indicators. Without this plugin, the indicators may not display correctly.

Indicators:

- Number of Open Major Cases (by day, week, month)
- Percentage of Resolved Major Cases (by day, week, month)
- Number of Cases which are Child of Major Case
- Percentage of Major Case Candidates (by day, week, month)
- Percentage of Child Cases which are Auto Created from Major Case
- Number of customers impacted by major issue

Platform Analytics Solutions for Self-Service Analytics for Customer Service

Platform Analytics Solutions contain prepackaged Performance Analytics and Reporting content for use with other ServiceNow AI Platform products. This Platform Analytics Solution quantifies the value of self-service using the Self-Service Analytics dashboard for customer service.

The following roles and tasks are associated with this Solution:

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- ServiceNow AI Platform administrator (admin): Install and activate this Platform Analytics Solution and make any necessary changes to system properties.
- Performance Analytics administrator (pa_admin): Review the indicators, breakdowns, widgets, and dashboards. Set up and start data collection. Share the dashboards with appropriate stakeholders.
- Customer service manager (sn_customerservice_manager): Use the Self-Service Analytics dashboard to view case metrics to understand the current performance of self-service at your organization.

Related topics

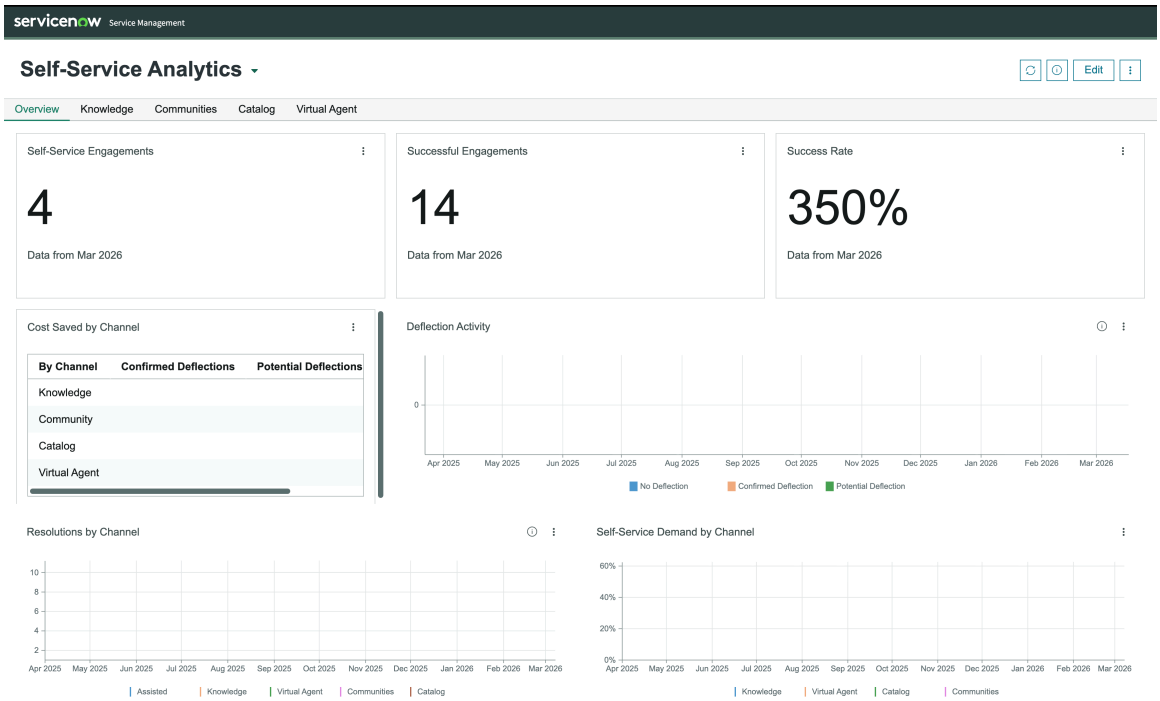
Configure the Platform Analytics Solution for Self-Service Analytics for Customer Service

Self-Service Analytics

Self-Service Analytics dashboard for Customer Service Management

Measure and track the effectiveness of self-service content through user activities on self-service portals to enrich the content and address any self-service gaps.

Overview tab



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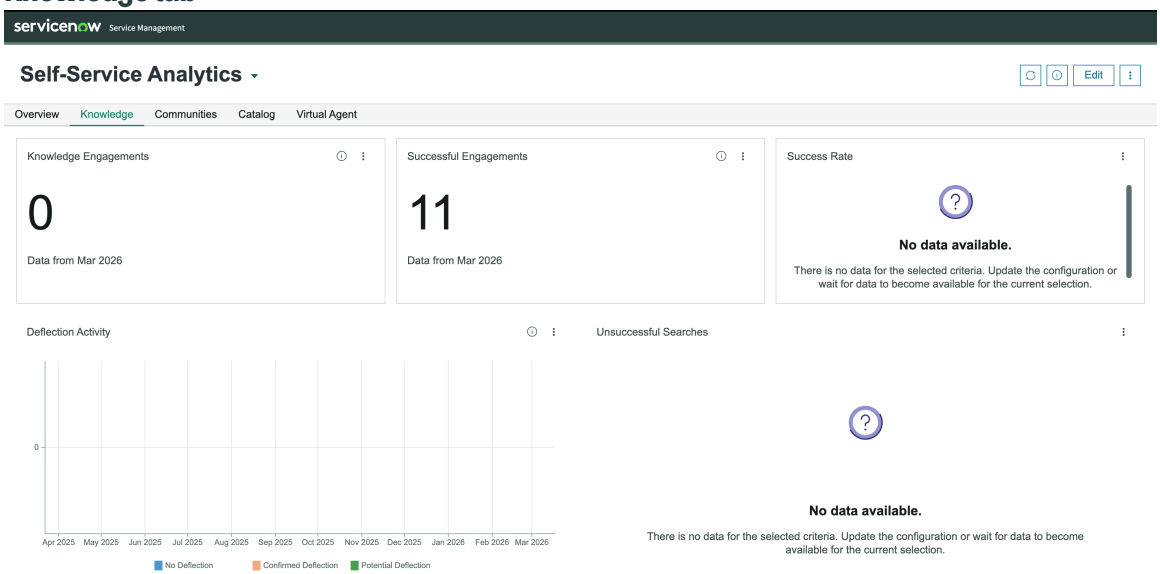
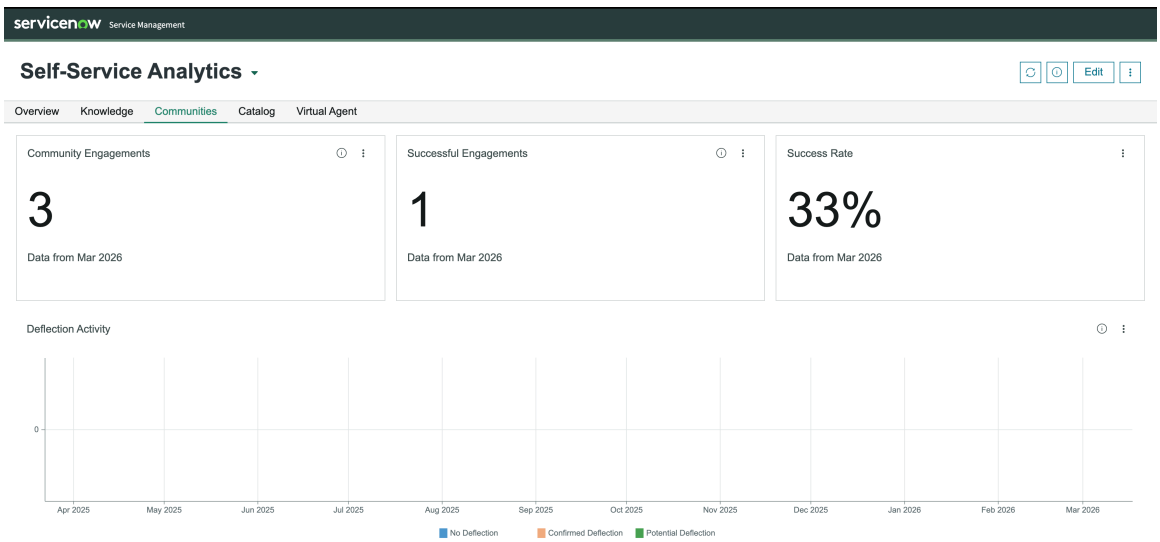
Knowledge tab



Communities tab



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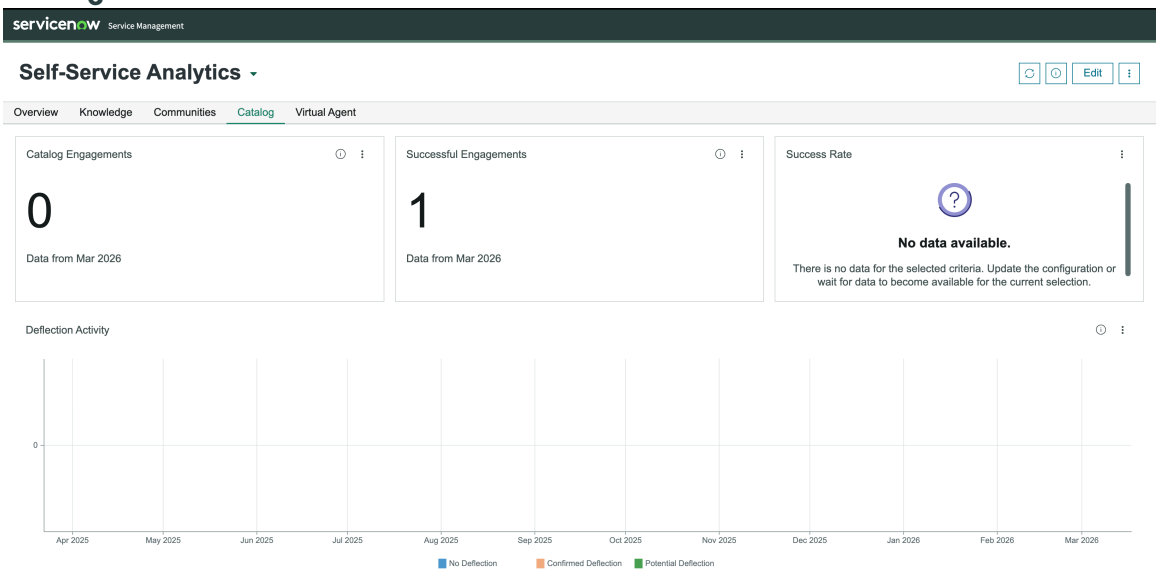
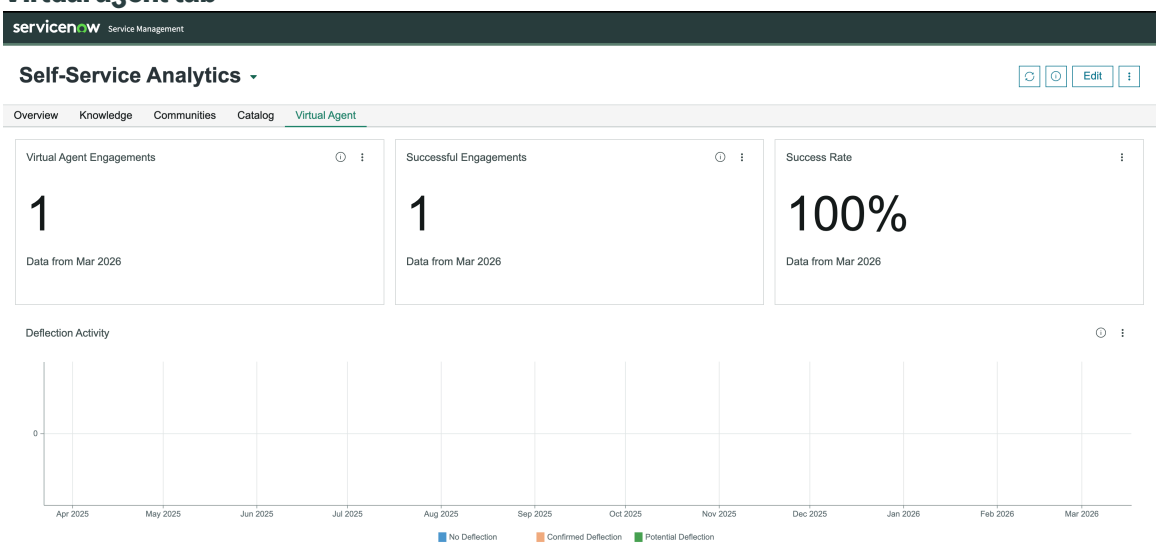
Catalog tab



Virtual agent tab



You can access this dashboard by navigating to **All** > **Platform analytics** > **Library** > **Dashboards**, and search for Self-Service Analytics dashboard. To edit this dashboard, you must set the application scope to **Self-Service Analytics for Customer Service** using the application picker.

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Note:

- On the Knowledge tab, you can report knowledge gaps for unsuccessful searches. For more information, see Report knowledge gaps based on unsuccessful searches.
- The Communities tab is available when the Communities plugin (com.sn_communities) is activated.
- The Virtual Agent tab is available when the Glide Virtual Agent plugin (com.glide.cs.chatbot) is activated.

End user and roles

End user and goal	Required role
Customer service manager: Can view case metrics like backlog, resolution rates, SLA, customer satisfaction, and KPIs to understand the current performance of self-service at an organization.	sn_customerservice_manager

Use case

Example 1

A user faces an issue with a purchased product. To resolve the issue, the user logs in to the portal, and searches for and views content. However, the user does not find any content helpful and creates a case.

Example 2

A user faces an issue with a purchased product. To resolve the issue, the user logs in to the portal, searches for and views content, marks the content as helpful, and continues to do other activities without creating a case.

The self-service content was available in both examples. However, in example 1, the user did not find the content helpful and therefore it did not help deflect the case creation. The Self-Service Analytics for Customer Service dashboard enables you to capture not deflected, deflected, or potentially deflected instances with details such as what the user was searching for using the searched terms, the content viewed, and the task created.

Indicators

Indicators define a performance measurement taken at regular intervals of a business service, an activity, or organizational behavior. These performance measurements result in a series of indicator scores over time.

When an administrator activates the Self-Service Analytics for Customer Service plugin (com.snc.pa.self_service_analytics_csm), the Self-Service Analytics PA (com.snc.pa.self_service_analytics) is also activated. Both plugins include indicators for the Self-Service Analytics dashboard for customer service.

The Self-Service Analytics for Customer Service plugin includes the following indicators:

Catalog: Deflections

A monthly count of catalog requests after which the primary activity (case creation) is either found (no deflection) or not found (confirmed or potential deflection) within an activity window.

Communities: Deflections

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A monthly count of community content types after which the primary activity (case creation) is either found (no deflection) or not found (confirmed or potential deflection) within an activity window.

Knowledge: Deflections

A monthly count of knowledge articles after which the primary activity (case creation) is either found (no deflection) or not found (confirmed or potential deflection) within an activity window.

Number of cases resolved

A monthly count of resolutions addressed by customer service agents.

> **Note:** The **Resolutions by Channel** widget on the Overview tab of the Self-Service Analytics dashboard for customer service displays this indicator as **Assisted**.

Number of Deflections

A monthly count of deflections for all self-service channels (Knowledge, Communities, Catalog, Virtual Agent).

Self-Service: Confirmed Deflections

A monthly count of deflections after which the primary activity (case creation) was not found depending on the activity type (helpful knowledge articles, helpful community content, catalog requests) within an activity window. An increase in value indicates better performance.

Self-Service: Cost Saved

A monthly calculation of the cost saving for a deflection. The score is calculated according to the formula `([[Self-Service: Confirmed Deflections]] + [[Self-Service: Potential Deflections]]) * 20`.

> **Note:** By default, the cost saved by each deflection is set to $20. However, you can modify the formula and set a different cost. To edit the formula, navigate to **Performance Analytics** > **Formula Indicators**, search for and click the **Self-Service: Cost Saved** indicator, and edit the numeric value in the **Formula** field. For more information, see Create a formula indicator.

Self-Service: Potential Deflections

A monthly count of deflections after which the primary activity (case creation) was not found depending on the activity type (knowledge articles views, community content views, Virtual Agent conversations) within an activity window. An increase in value indicates better performance.

VA: Deflections

A monthly count of Virtual Agent conversations after which the primary activity (case creation) is not found (potential deflection) within an activity window.

The Self-Service Analytics PA plugin includes the following indicators:

Catalog: Percentage of requests

A monthly calculation of the percentage of catalog usage compared with the use of other self-service channels. The score is calculated according to the formula `[[Number of Catalog requests]] / ([[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] + [[Number of Catalog requests]] + [[VA: Conversations this month]]) * 100`.

Catalog: Success Rate

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A monthly calculation of the percentage indicating the success of the catalog as a self-service channel. The score is calculated according to the formula `[[Number of Catalog requests]] / [[Catalog: Views this month]] * 100`.

Catalog: Views this month

A monthly count of catalog item views. An increase in value indicates better performance.

Communities: Helpful Feedback

A monthly count of helpful Community content types.

Communities: Percentage of community viewed

A monthly calculation of the percentage of Community content types usage compared with the usage of other self-service channels. The score is calculated according to the formula `[[Communities: Views this month]] / ([[Communities: Views this month]] + [[Knowledge: Articles viewed this month]] + [[Number of Catalog requests]] + [[VA: Conversations this month]]) * 100`.

Communities: Views this month

A monthly count of Community content type views. An increase in value indicates better performance.

Knowledge: Articles viewed this month

A monthly count of knowledge articles views. An increase in value indicates better performance.

Knowledge: Helpful Feedback

A monthly count of knowledge articles marked as helpful or rated either 4 or 5.

Knowledge: Percentage of articles viewed

A monthly calculation of the percentage of knowledge articles usage compared with the usage of other self-service channels. The score is calculated according to the formula `[[Knowledge: Articles viewed this month]] / ([[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] + [[Number of Catalog requests]] + [[VA: Conversations this month]]) * 100`.

Number of Catalog requests

A monthly count of catalog requests.

Percentage of helpful Community Content

A monthly calculation of the percentage indicating the success of Communities as a self-service channel. The score is calculated according to the formula `[[Communities: Helpful Feedback]] / [[Communities: Views this month]] * 100`.

Percentage of helpful Knowledge Articles

A monthly calculation of the percentage indicating the success of Knowledge as a self-service channel. The score is calculated according to the formula `[[Knowledge: Helpful Feedback]] / [[Knowledge: Articles viewed this month]] * 100`.

Self-Service: Engagements

A monthly calculation of the total of views from all self-service channels. The score is calculated according to the formula `[[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] +`

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`[[Catalog: Views this month]] + [[VA: Conversations this month]]`.

Self-Service: Success Rate

A monthly calculation of the percentage indicating the success of self-service channels. The score is calculated according to the formula `[[Self-Service: Successful Engagements]] / [[Self-Service: Engagements]] * 100`

Self-Service: Successful Engagements

A monthly count of helpful content from all self-service channels. The score is calculated according to the formula `[[Knowledge: Helpful Feedback]] + [[Communities: Helpful Feedback]] + [[Number of Catalog requests]] + [[VA: Successful Conversations]]`.

VA: Conversations this month

A monthly count of Virtual Agent conversations. An increase in value indicates better performance.

VA: Percentage of Conversations

A monthly calculation of the percentage of Virtual Agent conversation usage compared with the usage of other self-service channels. The score is calculated according to the formula `[[VA: Conversations this month]] / ([[Knowledge: Articles viewed this month]] + [[Communities: Views this month]] + [[Catalog: Views this month]] + [[VA: Conversations this month]]) * 100`.

VA: Success Rate

A monthly calculation of the percentage indicating the success of Virtual Agent as a self-service channel. The score is calculated according to the formula `[[VA: Successful Conversations]] / [[VA: Conversations this month]] * 100`

VA: Successful Conversations

A monthly count of Virtual Agent conversations that were not directed to live agents. An increase in value indicates better performance.

Breakdowns

Breakdowns enable you to group or filter indicator scores by a qualitative attribute.

This dashboard includes the following breakdowns:

Channel

Enables you to view indicator scores by a self-service channel such as Knowledge, Communities, Catalog, or Virtual Agents.

Communities Content Type

Enables you to view indicator scores by a Community content type such as answer, blog, comment, document, event, question, or video.

Knowledge Base

Enables you to view indicator scores by knowledge base.

Knowledge Category

Enables you to view indicator scores by knowledge article category.

Type of Deflection

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Enables you to view indicator scores by deflection type: no deflection, confirmed deflection, and potential deflection.

Data visualization

Title	Type	Description
Unsuccessful Searches	Bar	A monthly collection of searches for knowledge articles with no results or results with no clicks.

Related topics

Self-Service Analytics

Report knowledge gaps based on unsuccessful searches

Report a knowledge gap from the Unsuccessful Searches report in the Self-Service Analytics dashboard for customer service.

Before you begin
Role required: sn_customerservice_manager

About this task
The Unsuccessful Searches report in the Self-Service Analytics dashboard for customer service reports a collection of searches for knowledge articles with no results or results with no clicks. You can report a knowledge gap for such unsuccessful searches.

Procedure

1. Navigate to **All** > **Self-Service** > **Dashboards**.
2. Click **Self-Service Analytics**.
3. On the Knowledge tab, on the Unsuccessful Searches report, click a bar.
4. Click **Report Knowledge Gap**.
5. In the **Description** field, describe the knowledge gap.
   By default, the **Description** field shows frequently appearing words in the associated collection. You can also enter custom instructions for addressing the knowledge gap. When entering instructions, you can provide a summary of your analysis so that knowledge authors have the necessary information to create an article from the feedback task.
6. Click **Submit**.

Result
If a collection is reported as a knowledge gap, a feedback task of type Unsuccessful search is created in the Knowledge Management application. If the assignment rules are set, the feedback task is assigned to an ownership group or an author.

Related topics

Self-Service Analytics dashboard for Customer Service Management

Customer Service Management reference

Reference topics provide additional information about the Customer Service Management application.

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Reference information	Links to topics
Customer Service lists and forms	• Customer Service Cases list • Customer Service forms • Chat Setup configuration form
Components installed with Customer Service Management applications	• Components installed with CSM workspaces • Components installed with additional plugins for Customer Service Management • Components installed with CSM workspaces
Engagement Messenger topics	• Components installed with Engagement Messenger • Engagement Messenger reference • Feature context parameters supported in Engagement Messenger • Engagement Messenger translation tables
Portal topics	• Portal Banner widget JSON parameters • Portal Data List widget JSON parameters • Default highlight color for different case states
CSM Query Rules	The system uses query rules to filter the records in CSM-related tables that are accessible by users with CSM roles.

Configurable Portal Widgets reference

Reference tables for configuring Portal Widgets instance options, and JSON parameters.

Configurable Portal widgets instance options

Reference topics provide information about the instance options for all the Configurable Portal widgets.

Portal Browse Taxonomy widget instance options form

Instance options enable you to configure the Portal Browse Taxonomy widget on the portal.

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Behavior fields on the Instance form

Instance option	Description
Records Per View	The number of catalog items and knowledge articles to appear by default on the widget. The default value is 9.
Glyph for Article Cards	The glyph to appear on the cards, which is chosen from a set of predefined glyphs.
Show Author	Option to display the author's name.
Show View Count	Option to display the total number of views of an article.
Show Last Updated	Option to display the date of the last changes made to an article.
Show Rating	Option to display the rating received on an article. The appearance of the star rating is defined by the (*glide.knowman.show_star_rating*) system property.
Article View Page	The article page that opens when the article card is accessed. By default, this field is set to the Knowledge Article View (kb_article_view) page.
Catalog Card Display Style	The display style of a catalog card inside the widget. The available choices are: • Icon: An image that appears next to a catalog item. Each catalog item can have its own image. This image is defined by the catalog item entry in the Catalog item [sc_catalog_item] table. • Glyph: Glyph that appears next to all catalog items. The default display style is Icon. **Note:** Currently, if you select None, the display style is set to Icon.
Glyph for Catalog Items	Displays a window to select a symbol for a catalog items. **Note:** The value in this field is used only when Glyph is selected in the **Catalog Card Display Style** field.
Catalog Item Page	The Catalog item page that opens when the catalog item is accessed. By default, this field is set to the Catalog Item [sc_cat_item] table.
Display icon for topics	Option to display an icon for the taxonomy topics.
Catalog Order	The Catalog Order Guide page that opens when the catalog order guide is accessed. For details, see Order guides

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Behavior fields on the Instance form (continued)

Instance option	Description
Guide Page	By default, this field is set to the Order guide [sc_cat_item_guide] table.

Related topics

Portal Browse Taxonomy widget

Add and configure the Portal Browse Taxonomy widget

Portal Header notification, approval, and survey form

Notifications, approval, and, survey forms fields for portal header.

Notification form

Field	Description
Label	Name that appears for the item on the header. The default text is `Notification`.
Parent Menu	This field should already contain the name of the menu you're adding items to.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The type of page the item links to. You must select **Scripted List** from the list.
Application	Application for the menu item
Condition	Determines what conditions are required for menu items to show on the header.
Glyph	Icon that appears next to the item.

Approval form

Field	Description
Label	Name that appears for the item on the header. The default text is `Approval`.
Parent Menu	This field should already contain the name of the menu you're adding items to.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The type of page the item links to. You must select **Scripted List** from the list.
Application	Application for the menu item
Condition	Determines what conditions are required for menu items to show on the header.
Glyph	Icon that appears next to the item.

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Survey form

Field	Description
Label	Name that appears for the item on the header. The default text is `Survey`.
Parent Menu	This field should already contain the name of the menu you're adding items to.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The type of page the item links to. You must select **Scripted List** from the list.
Application	Application for the menu item
Condition	Determines what conditions are required for menu items to show on the header.
Glyph	Icon that appears next to the item.

Related topics

Configure notification, approval, and survey for your portal header

Portal Banner widget instance options form

Instance options enable you to configure the Portal Banner widget on a portal page.

Presentation fields on the Instance form

Instance option	Description
Heading	Required title of a Portal Banner widget to greet a user who signs in into the website. The default text is `Home Page Banner`. The heading field supports placeholder variables such as <user>, <title>, and <part_of_day>. For example, you could display a banner title such as `Hello Mr. Luddy! Good Morning.` • <user>: The name of the logged-in user. • <title>: The salutation of the logged-in user. The <title> variable details are retrieved from the User [sys_user] table. • <part_of_day>: Displays the greeting based on the part of the day of the user's region. For example, Good morning, Good afternoon, or Good evening.
Description	Required subtitle that appears under the heading. The default description is `This is home page description.`
Background Image	Image to appear as the background on the banner. **Note:** You can select images from the Images [db_image] table or upload a new image to it. For more information, see Storing images in the database.
Heading Text Color Hex code	Color of the heading text in hex code format. The default value is #FFFFFF (white).

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Presentation fields on the Instance form (continued)

Instance option	Description
Description Text Color Hex code	Color of the description text color in hex code format. The default value is #FFFFFF (white).
Alignment	Alignment of the banner content inside the widget. The available options are: • Left • Center The default alignment is Center. **Note:** Currently, if you select None, the alignment is set to Left.
Show Search bar	Option to display the search bar on the Portal Banner widget to search content. **Note:** You can enable the AI search for a banner widget to get quick results. For more information, see Enable and configure AI Search in Service Portal.
Show Primary Button	Option to display the primary button on the Portal Banner widget.
Primary Button Label	Label of the primary button.

Primary Button URL	The URL that opens an internal web page or a portal page in the same tab and an external page or a portal in a new tab. The two types of primary URLs are:
	• Absolute URL: The full URL including its protocol (http or https). For example:
	`https://example.servicenow.com/scripts/sn_csm_ec.js?v=3.1`
	• Relative URL: A URL that includes only the path that comes after the domain. For example:
	`scripts/sn_csm_ec.js?v=3.1`

Show Secondary Button	Option to display a secondary button on the banner widget.
Secondary Button Label	Label of a secondary button.
Secondary Button URL	The URL that opens an internal web page or a portal page in the same tab and an external page or a portal in a new tab. The two types of secondary URLs are:

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Presentation fields on the Instance form (continued)

Instance option	Description

	• Absolute URL: The full URL including its protocol (http or https). For example:
	`https://example.servicenow.com/scripts/sn_csm_ec.js?v=3.1`
	• Relative URL: A URL that includes only the path that comes after the domain. For example:
	`scripts/sn_csm_ec.js?v=3.1`

Search Placeholder Text	Placeholder text for the search option. The default text is `Search articles and request items`.

Behavior fields on the Instance form

Instance option	Description
Buttons Condition Script	Script to show or hide the primary or secondary button. You can use the scripted extension point to implement the condition script. By default, the new script displays both buttons and doesn't include any condition. For more information, see Provide web page link buttons to display on the Portal Banner widget.
Widget Placeholder	Option to embed an additional widget on the Portal Banner widget. You can include only widgets from the Widgets [sp_widget] table.
Widget Option Schema	Defines the parameters of the widget that you want to add. For more information, see Add a widget in the Portal Banner widget.

Related topics

Portal Banner widget

Add and configure the Portal Banner widget

Provide web page link buttons to display on the Portal Banner widget

Add a widget in the Portal Banner widget

Portal Banner Carousel widget instance options form

Instance options enable you to configure the Portal Banner Carousel widget on a portal page.

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Data fields on the Instance form

Instance option	Description
Slides	The images to appear on the widget chosen from a set of predefined slides or slides that you have created. For more information, see Create a slide for the Portal Banner Carousel widget.

Presentation fields on the Instance form

Instance option	Description
Title color	Color of the title for all carousel slides in hex code format. The default value is #FFFFFF (white).
Alignment	The alignment of content inside the widget for all carousel slides. The available options are: • Left • Center The default alignment is Left. **Note:** Currently, if you select None, the alignment is set to Left.

Related topics

Portal Banner Carousel widget

Add and configure the Portal Banner Carousel widget

Create a slide for the Portal Banner Carousel widget

Portal Case Cards widget instance options form

Instance options enable you to configure the Portal Case Cards widget on a portal page.

Data fields on the Instance form

Instance option	Description
Case Table	Table from which the records shown as case cards on the widget are selected. By default, this field is set to the Cases [sn_customerservice_case] table and the extended table is Complaint Case [sn_complaint_case].
Query	Query to filter the case records. The default query shows cases that are awaiting information or are resolved.

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Data fields on the Instance form (continued)

Instance option	Description
	Note: If no query is provided, all case records are displayed in the widget. For more information, see Generate an encoded query string through a filter.
Sort by	Field in the Cases [sn_customerservice_case] table that determines the field by which cases are sorted when displayed on the widget. The default value is Last updated.
Sort Order	The order in which the cases appear on the widget. The available options are: • z to a • a to z The default sort order is z to a. **Note:** Currently, if you select None, the order is set to z to a.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Case cards widget. The default text is `Track case updates`.
Description	Subtitle that appears below the heading.

Behavior fields on the Instance form

Instance option	Description
Max Cases to Display	Number of cases to appear by default on the widget. The default value is 10.
Card Title	Required title of the Case Cards widget.
State Highlight Color	Color of the background and text for the different states of a case in hex code format.
Card Display style	Display style for a case card inside the widget. The available options are: • Show case fields • Show latest activity • Title only The default display style is Show the latest activity

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Behavior fields on the Instance form (continued)

Instance option	Description
	Note: Currently, if you select None, the display style is set to Show latest activity.
Select Case Fields	Display case fields for a case card in the widget, which are chosen from a set of predefined set of fields in the Cases [sn_customerservice_case] table. You can show a maximum of three fields. This field is available only when **Show case fields** is selected from **Card display style**.
Case View Page	The portal page that displays the details of a case record when the case card is accessed. By default, this field is set to the Case (csm_ticket) page.
View All Page	Option to display all cases when **View all** is accessed on the widget. The **View all** option on the Portal Case Cards widget is displayed under the following conditions: • The number of cases resulting from the query provided in the **Query** field is more than the defined value in the **Max Cases to Display** field • A page has been selected from a set of predefined set of pages
Hide Empty Case Widget	Option to hide the widget when no records are available to display. If this option isn't selected, an empty widget shows the text defined in the **Empty State Text** option.
Empty State Text	The text displayed in the widget when **Hide Empty Case Widget** isn't selected and the widget has no records to display. The default text is `No updates right now`.

Related topics

Portal Case Cards widget

Add and configure the Portal Case Cards widget

Display the integer values of all case states

Default highlight color for different case states

Default values for the background and text color for all case states on the Portal Case Cards widget.

Default background color for all case states

State name	Default value	Color
New	#CBE9FC	Pale blue
Open	#D1D2EE	Pale purple

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Default background color for all case states (continued)

State name	Default value	Color
Awaiting Info	#FBF7BF	Pale yellow
Resolved	#D2EABC	Celadon green
Closed	#C2C4CA	Grey
Canceled	#FFCCD2	Salmon pink

Portal Quick Links widget instance options form

The instance options enable you to configure the Portal Quick Links widget on a portal page.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Quick Links widget. The default text is `Quick Links`.
Show Carousel	Option to switch between carousel view and grid view.
Quick Links	Field from which you can select the catalog items, knowledge articles, or URL to show as quick links on the widget. By default, this field is set to the pre-defined Quick Links from the sn_ex_sp_quick_link table. You can also create a quick link and add it to the Quick Links [sn_ex_sp_quick_link] table. For more information, see Create a quick link. You can display title, short description, background image, and icon fields on the card in the widget. Following are the fields of the table • Content type: options are: article, catalog item, external link and page • Content: select the content • Quicklink name • Title: Displays as a title of quick link card • Short description: Displays as description of quick link card • Background image: Displays as thumbnail quick link card when card display style is thumbnail • Icon: Displays as an icon on quick link card when card display style is icon on top or left

Behavior fields on the Instance form

Instance option	Description
Card Display Style	Display the style of a card tile on the widget. The available options are:

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Behavior fields on the Instance form (continued)

Instance option	Description
	• Thumbnail • Icon on top • Icon on left • Simple text • Tile only The default display style is Thumbnail. **Note:** Currently, if you select None, the style is set to Thumbnail.

Related topics

Portal Quick Links widget

Add and configure the Portal Quick Links widget

Portal Knowledge Quick Links widget instance options form

The instance options enable you to configure the Portal Knowledge Quick Links widget on a portal page.

Data fields on the Instance form

Instance option	Description
Knowledge Table	Table from which the records shown as a card on the widget are selected. By default, this field is set to the Knowledge [kb_knowledge] table.
Display Articles	Displays knowledge articles from the associated knowledge base. The available options are: • Manually select: Displays knowledge articles chosen in the **Manually Select Articles** field. • Dynamic query: Displays knowledge articles that meet the condition of a query in the Knowledge [kb_knowledge] table defined in the **Dynamic Query** field. If no query is provided, all knowledge articles are displayed in the widget. For more information, seeGenerate an encoded query string through a filter • Criteria based: Displays knowledge article based on the criteria Most viewed, Most useful, and Featured. The criteria is determined by the **View** field in the Knowledge [kb_knowledge] table. The default selection is Criteria based. **Note:** Currently, if you select None, the selection is set to Criteria based.
Manually Select Articles	The knowledge base articles to appear on the widget that are chosen manually from a set of predefined articles associated with the portal using the knowledge base ID of the article.

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Data fields on the Instance form (continued)

Instance option	Description
	This field applies only when **Manually select** is selected from **Display Articles**.
Dynamic Query	Query to filter the records to display on the widget
Criteria Based	Displays articles on the widget based on the selected criteria. The available options are: • Most Viewed • Most Useful • Featured This field applies only when **Criteria based** is selected from **Display articles**. **Note:** Currently, if you select None, the criteria is set to Most Viewed.
Sort by	Determines the field in the Knowledge [kb_knowledge] table by which quick links are sorted and displayed on the widget. The default value is View Count. This field applies only when **Manually select** or **Dynamic query** is selected from **Display articles**.
Sort Order	The order in which knowledge articles appear on the widget. By default, the order is z to a The available options are: • z to a • a to z This field applies only when **Manually select** or **Dynamic query** is selected from **Display articles**. **Note:** Currently, if you select None, the order is set to z to a.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Knowledge Quick Links widget. The default text is `Article Quicklinks`.

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Behavior fields on the Instance form

Instance option	Description
Show Carousel	Option to switch between carousel view and grid view.
Max Quicklinks to Display	Number of knowledge article quick links to appear by default on the widget. **Note:** The default value is 10.
Glyph	Glyph to appear on all cards chosen from a set of predefined glyphs.
Show Author	Option to display the author's name.
Show View Count	Option to display the total number of views of an article.
Show Last Updated	Option to display the date of the last changes made to an article.
Show Rating	Option to display the rating received on an article. The appearance of the star rating is defined by the (`glide.knowman.show_star_rating`) system property.
Article View Page	The article page that opens when the article card is accessed. By default, this field is set to the Knowledge Article View (kb_article_view) page.

Related topics

Portal Knowledge Quick Links widget

Add and configure the Portal Knowledge Quick Links widget

Portal Catalog Quick Links widget instance options form

The instance options enable you to configure the Portal Catalog Quick Links widget on a portal page.

Data fields on the Instance form

Instance option	Description
Display Catalog Items	Displays catalog items according to the selection. The available options are: • Manually select • Dynamic query The default selection is Dynamic query. **Note:** Currently, if you select None, the selection is set to Dynamic query.

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Data fields on the Instance form (continued)

Instance option	Description
Manually Select Catalog Items	The catalog items to appear on the widget chosen manually from a set of predefined catalog items that are associated with the portal. This field applies only when **Manually select** is selected from **Display Articles**.
Dynamic Query	Query to filter catalog records to display on the widget. By default, this field is set to the Service Catalog items [sc_cat_item] table. This field applies only when **Dynamic query** is selected from **Display articles**.
Sort by	Field in the Service Catalog items [sc_cat_item] table that determines the field by which records are sorted and displayed on the widget. This field applies only when **Manually select** or **Dynamic query** is selected from **Display articles**.
Sort Order	The order in which the catalog items appear on a widget. The default sort order is Z to A.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Catalog Quick Links widget. The default text is `Catalog Quick Links`.

Behavior fields on the Instance form

Instance option	Description
Show Carousel	Option to switch between carousel view and grid view.
Max Quicklinks to Display	Number of catalog items to appear by default on the widget. The default value is 10.
Card Display Style	The display style of a card on the widget. The available options are: • Thumbnail • Icon on top • Icon on left • Simple text • Title only The default display style is Thumbnail.

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Behavior fields on the Instance form (continued)

Instance option	Description
	Note: Currently, if you select None, the display style is set to Thumbnail.
Catalog Item page	The Catalog item page that open when the catalog item is accessed. By default, this field is set to the Service Catalog items [sc_cat_item] page.

Related topics

Portal Catalog Quick Links widget

Add and configure the Portal Catalog Quick Links widget

Portal Data List widget instance options form

The instance options enable you to configure the Portal Data List widget on a portal page.

Data fields on the Instance form

Instance option	Description
Data	Defines the configuration of different categories in the navigation within the widget.
Dynamic data list	Option to display records dynamically based on the configuration provided in the parameter of a portal page URL. **Note:** • The configuration enables administrator to display records from any tables by passing following URL parameters: table, filter, sort order, view, and target view page. • When the **Dynamic data list** is selected, the JSON configuration in the **Data** field is not available.

Presentation fields on the Instance form

Instance option	Description
Categories heading	Required title for all categories. The default text is `Categories`.
Show list title	Show or hide the list title. The default value is `true`.

Behavior fields on the Instance form

Instance option	Description
Layout	Layout type of the case records and their details displayed in the widget. The available options are:

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Behavior fields on the Instance form (continued)

Instance option	Description
	• List view (for both desktop and mobile) • Card view (for both desktop and mobile) • List view (for desktop) & Card view (for mobile) **Note:** Currently, if you select None, the layout is set to List view (for desktop) & Card view (for mobile). The default configuration is List view (for desktop) & Card view (for mobile).
Number of records per page (Desktop)	The number of cases to appear by default on the widget in the desktop. The default value is 20. The maximum value is 1000.
Number of records per page (Mobile)	The number of cases to appear by default on the widget on a mobile device. The default value is 8.
Show search	Option to display a search field in the widget.
Show export actions	Option to enable the export of records in pdf, Excel, and csv formats.
Data List Condition Script	Script to show or hide the data list category on the widget. For more information, see Hide or show categories in the Data List widget. Script to modify the view on the data list widget. For details, see, Modify view in the Data List widget. Script to filter records in the Data List widget. For details, Filter records in the Data List widget. The default script is *`DataListCategoryConditionScript`*.

Related topics

Portal Data List widget

Add and configure the Portal Data List widget

Hide or show categories in the Data List widget

Portal FAQ widget instance options form

The instance options enable you to configure the Portal FAQ widget on a portal page.

Data fields on the Instance form

Instance option	Description
Knowledge Table	Table from which the records shown as frequently asked questions (FAQs) on the widget are selected. By default, this field is set to the Knowledge [kb_knowledge] table.
Question Field	The field of the table set in the **Table** field that contains the questions.

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Data fields on the Instance form (continued)

Instance option	Description
	Records with an empty question field aren't displayed on the widget.
Answer Field	The field of the table set in the **Table** field that contains the answer. Records with an empty answer field aren't displayed on the widget.
Query	Query to filter FAQs. If this field is empty, the widget displays all the FAQs. You can include fields from the provided table only in the encoded filter query. For more information, see Generate an encoded query string through a filter
Sort by	Field in the Knowledge [kb_knowledge] table that determines the field by which FAQs are sorted and displayed on the widget. By default, the field is set to View Count.
Sort Order	The order of the FAQs on the search result page on the widget. The available options are: • z to a • a to z The default order is z to a. **Note:** Currently, if you select None, the order is set to z to a.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal FAQ widget. The default text is `Frequently Asked Questions`.

Behavior fields on the Instance form

Instance option	Description
Display search	Option to display a Search field on the widget.
Search Bar placeholder text	Placeholder text for the search field label. The default text is `Search FAQs`.
FAQ View Page	The article page that opens when the **Read more** option is selected by the user. By default, this field is set to the kb_article_view.
FAQ per page	The number of FAQs to appear by default on the widget.

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Behavior fields on the Instance form (continued)

Instance option	Description
	The default value is set to 5.
Browse Options	The filter options that appear in the widget and can be selected by the user. The available options are: • Knowledge Category • Related products The default option is Knowledge Category. **Note:** Currently, if you select None, the filter option is set to Knowledge Category.
Show Read More	Displays the entire content of an article when the related FAQ is accessed on the widget. The available options are: • Always: Display the **Show Read More** option on a widget for both complete and incomplete preview content • Exceeds preview: Display the **Show Read More** option only when the article content exceeds the preview limit on the widget The default option is Exceed preview. **Note:** Currently, if you select None, the filter option is set to Knowledge Category.

Related topics

Portal FAQ widget

Add and configure the Portal FAQ widget

Portal Object widget instance options form

Instance options enable you to configure the Portal Object widget on a portal page.

Data fields on the Instance form

Instance option	Description
Table	Table from which the fields of the selected record are shown as cards on the widget. The default table is the Asset [alm_asset] table.
Record	The system identifier (sys_id) of the record from the specified table. The default sys_id is 00a96c0d3790200044e0bfc8bcbe5dc3.

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Data fields on the Instance form (continued)

Instance option	Description
	Note: Note: • Displays details of the record identified by the sys_id in the URL. If no sys_id is found in the URL, displays details of the record identified by the sys_id in the instance option. • If the sys_id is provided in both the portal web page URL and the **Record** field, the widget displays information based on the portal web page URL. • The sys_id of a record should be taken from the table specified in the **Table** field.

Dynamic portal object	Option to display record dynamically based on the configuration provided in the parameter of a portal page URL.
	Note:
	• The configuration enables administrator to display record from a table in the Portal Object Widget by passing following URL parameters: table, sys_id and view.
	• The portal object title and displayed columns are derived from the view specified in the URL parameter. The first column in the view is used as the object title, and the remaining columns are displayed in the summary view.
	• When the **Dynamic portal object** is selected, only the following three Instance options can be configured:
	  ○ Actions
	  ○ Enable Service Definitions
	  ○ Enable Editing Record

Behavior fields on the Instance form

Instance option	Description
Card title	Fields of the selected record from the specified table to be displayed as the card title in the widget. **Note:** You can select up to three fields from the defined table. They'll be combined to form a title for each record displayed on the widget. For example, if you combine the Asset tag, Model category, and Display name fields of a record from the specified table, the card title would be "P1000479 Computer Apple MacBook Pro 15."
Image field	The name of the field of the selected record that contains an image to be displayed as an image on the card.
Image style	The display style for an image inside the widget. The available choices are:

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Behavior fields on the Instance form (continued)

Instance option	Description
	• Thumbnail • Avatar The default display style is Thumbnail.
Summary view fields (Desktop)	Fields from the specified table whose name and value are displayed as field value pairs on the card in the desktop view.
Summary view fields (Mobile)	Fields from the specified table whose name and value are displayed as field value pairs on the card in the mobile view.
Details view	Field value pairs and sections from the specified table to be displayed when the **View all** option is selected on the card.
Actions	The actions to appear on the card, which are chosen from a set of predefined actions. The title field from the specified table is used as the display name of the actions. **Note:** • If you select multiple actions, the button label displays **Actions**. • If one action is selected, the actions button displays the name of that action. • If no action is selected, the actions button isn't displayed on the card.
Enable Service Definitions	Option to display the service definitions associated with the record under **Actions**. For details, see Service definitions.
Enable Editing Record	When enabled, users with edit permissions see **Edit details** button as one of the Actions. On selecting it users are navigated to a form page with the default view to edit the record details.

Related topics

Add and configure the Portal Object widget

Portal Taxonomy Topic widget instance options form

Instance options enable you to configure the Portal Taxonomy Topic widget on a portal page.

Presentation fields on the Instance form

Instance option	Description
Title	Required title of a Portal Taxonomy Topic widget. The default text is `Browse topics`.
Description	Required subtitle that appears below the title. The default text is `Navigate through topics to explore our services and resources.`

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Behavior fields on the Instance form

Instance option	Description
Max topic cards to display	Number of topic cards to appear by default on the widget. The default value is 8.
Display icon for topics	Option to display an icon for the taxonomy topics. By default, the card displays an icon for topic cards.
Display topic description	Option to display the description for the topic.
Button label	Name for the **View all** button. The default text is `View all`.
Browse taxonomy page	The page ID of a portal page that opens when a topic card is accessed in the Portal Browse Taxonomy widget.

JSON parameter in Configurable Portal Widgets

JSON parameter in Configurable Portal Widgets

Portal Banner widget JSON parameters

JSON parameters define aspects of the Portal Quick Links widget on the Portal Banner widget.

Note: This information assumes that you're familiar with the JSON code format.

JSON parameters

Parameter	Description
widget_title	Required title of the widget. The default text is `Quick Links`.
card_display_style	The style of a card tile for quick links inside the Portal Banner widget. The available options are: • Thumbnail • Icon on top • Icon on left • Title & description only • Title only The default display style is Thumbnail. **Note:** Currently, if you select None, the style is set to Thumbnail.
show_carousel	Option to switch between carousel view and grid view.
quick_links	Name of the field in the presentation section. The default text is `Quick Links`.

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Related topics

Portal Banner widget

Add and configure the Portal Banner widget

Script parameters for the search option in the Portal Banner widget

Description of the JSON parameters for the search option in the Portal Banner widget.

JSON parameter and description

Parameter	Description
Title	Text to appear in the search field before a user starts typing.
Size	Determines the font size and height of the widget. The permitted values are xs, sm, md, and lg.
Color	Color of the search button provided in hex code. The default value is #FFFFFF (white).

Related topics

Portal Banner widget

Add and configure the Portal Banner widget

Portal Data List widget JSON parameters

JSON parameters define aspects of the Portal Data list widget on the portal page.

Note: This information assumes that you're familiar with the JSON code format.

JSON parameters

Parameter	Description
categories	Each category displays a set of records from the Customer Case View Case [sn_customerservice_case] table that meets the filter criteria. For each category, you can choose from pre_defined_filters and run_time_filters predefined filter tabs. You can also set the columns for the list view and choose which fields appear in the card view.
ID	A unique identifier that enables the categories condition script to determine whether to show or hide categories on the widget.
label	Name of the category that appears on the navigation pane. If a label isn't entered, the category doesn't appear.
table	The table from which the records are shown on the widget when a category is selected.

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JSON parameters (continued)

Parameter	Description
	By default, this field is set to the Case [sn_customerservice_case] table.
list_view	The name of the view that defines the list of columns or fields to appear on the widget. For more information on these views, see Create and delete views. If no value is provided, all columns are shown.
card_view_primary_column	A field from the defined table that appears in the first column of a card. For example, you can show the case number in the first column.
card_view_secondary_column	A field from the defined table that appears in the second column of a card. For example, you can show short description of the case record. This parameter is optional.
card_view_additional_columns":"column1|column2|column3|column4	Field pairs from the defined table that appear as additional columns of a card. You can add a maximum of four additional columns. This parameter is optional.
query":"active=true"	Query to filter the records that display under the category. If no value is provided, all records are displayed.
glyph":"glyph_name"	The glyph to appear on the left of the category label in the navigation pane. The glyph name provided should be from the font-awesome library, which can be accessed at the following URL: `https://fontawesome.com/v4/icons/` The currently supported version of the font-awesome library is v4.7. If you use a glyph name from a different version, the image will not appear correctly. **Note:** If both a glyph and an image are defined, the image is displayed. This parameter is optional.
"image_name":"file_img"	An image to appear on the left of the category.

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JSON parameters (continued)

Parameter	Description
	Select the image name from the Images [db_image] table. **Note:** If both a glyph and an image are defined, the image is displayed. This parameter is optional.
record_view_page	The Service Portal that displays the page with details of any record accessed in the widget. This parameter is optional. By default, this field is set to the Case (csm_ticket) page.
pre_defined_filters "filter_name":"Value",	Display cases which are in New, Closed, Open, or Awaiting Info state in any selected category. These filters appear as tabs in the widget. Only Open and Closed case are included by default in the JSON code. The available values are: • filter_name: Name of the filter tab. • Value: Name of the case state such as New, Closed, Open, or Awaiting Info. This parameter is optional.
run_time_filters	Displays column and its fields from the defined table as runtime filters in a drop-down list. These runtime filters filter the case records displayed in the widget based on different fields from the defined table. For example, you can display Priority as a column and State, Contact, or Updated as fields. If the runtime filters values are not provided in the column and selection_type parameters, the filter icon will not appear for the category. This parameter is optional.
selection_type	Display the type of selection. The available options are: • Single select: Single selection for the filter column • Multi select: Multiple selection values for the filter columns
values	Values from the defined table for the column parameter. The available values are:

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JSON parameters (continued)

Parameter	Description
"value":"4"	• Label: Name of a value • Value: Integer value of a field
"ranges": "label":"Last Month", "query":"<Range condition>",	Filters the records using a query defined in the label and query parameters. For example, you can display case records that have been updated in the last month, last 3 months, or last 6 months. The range configuration is: • Label: Name of the filter option • Query: Query that defines a set of values grouped under a label This parameter is optional.
`"role_based_views": { "field_service_agent_view": "snc_field_technician", "agent_case_view":["snc_customer_service_agent","snc_manager"] }`	Displays the data list according to the role of the logged-in user. List the roles in an array to map multiple roles to the same view. All roles in that array share the same view. For example, if you want both support agents and service managers to see the same case view, assign the same view to both roles within an array. Use a view such as `"agent_case_view"`. When a user has multiple roles the system uses the first matching view it finds. This parameter is optional.
"guest_view":"viewname	Displays items for guest users or users who aren't logged in. Map the view you wish to display for the guest users. To make the items available to guest users, you must set these to public: • Portal Data List widget. • Page containing widget (for example, Cases and Tasks). • Page content instance. For details, see Configure public access on the Portal Data List widget. This parameter is optional.
"sort_by":"<column name>"	Sorts the data list when it first loads.

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JSON parameters (continued)

Parameter	Description
	This parameter is optional.
"sort_order":"<asc/desc>"	Sort order for the data list. Default is ascending. This parameter is optional.
show_all_reference_filter_values	Controls how dropdown values are populated for a reference-type runtime filter column. Applies per reference column, per category. The default value is `false`. The available options are: • **False** (default): The dropdown shows only reference values that appear in the current list. • **True**: The dropdown shows every value in the referenced table that the user has access to, including values that no record in the current list points to. For guidance on when to enable this parameter, see Best practices for runtime filters. This parameter is optional.
scope_runtime_filters_to_sub_category	Controls whether runtime filter dropdowns are scoped to the records in the active subcategory tab. Applies when subcategories are configured. The default value is `false`. The available options are: • **False** (default): Filter dropdowns show values from across all subcategory records, and selected filters persist when switching tabs. • **True**: Filter dropdowns show only the values present in the active subcategory's records. Switching subcategory tabs resets any selected filters. For guidance on when to enable this parameter, see Best practices for runtime filters. This parameter is optional.

Best practices for runtime filters

Some field types work well as runtime filters. Others produce unusable dropdowns or slow load times.

Use these field types as filters:

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- Choice or state fields with a bounded set of values, such as Priority, State, or Category.
- Reference fields that users naturally filter by, such as Account, Assignment Group, or Contact.
- Date fields configured with ranges, such as "updated in the last month."

Avoid these field types as filters:

- Free-text fields such as Short description or Work notes, since each unique value makes the dropdown unusable and slows load times.
- High-cardinality fields that don't work as filters, such as Number, sys_id, or raw timestamps.
- Fields that the user's role can't read due to ACLs, which return empty or partial dropdowns.

When to enable show_all_reference_filter_values

Set this option to `true` when:

- You want to filter by any valid value in a reference field, not only values in the current list.
- The referenced table holds less than about 2,000 records, so loading the full set of accessible values stays fast.

Set this option to `false` (default) when reference values in the list are few. Users can filter by values in the current results. This keeps the dropdown focused and concise.

When to enable scope_runtime_filters_to_sub_category

Set this option to `true` when subcategories hold clearly distinct sets of records and filter options should stay relevant to the active tab.

Set this option to `false` (default) when:

- You need one consistent set of filter values across all subcategories.
- Filter continuity matters across tabs, since enabling this option resets active filter selections when a user switches tabs.

Related topics

Add and configure the Portal Data List widget

Portal Footer widget JSON parameters

Use the JSON parameters to define aspects of the Portal Footer widget on the portal page.

Note: This information assumes that you're familiar with the JSON code format.

JSON parameters

Parameter	Description
org_info	The company name and address to appear on the portal footer.
copyright	Copyright information to appear on the portal footer. You can display copyright symbol, the year of copyright, and the name of the copyright holder or organization in the footer.
logo_img_name	The image that can be displayed as a logo in the footer.

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JSON parameters (continued)

Parameter	Description
	The image name should to be accessed from the Images [db_image] table.
logo_alt_text	Alternate screen-readable text that describes the brand logo in the footer for accessibility purposes.
sitemap_links_menu_sys_id	The system identifier (sys_id) of the menu record is used to display sitemap links in the Portal Polaris Footer widget. You can create a menu record and map it to the sitemap links by including its sys_id in the JSON code. For more information on how to create a menu record, see Menu Item form.
footer_links_menu_sys_id	The system identifier (sys_id) of the menu record is used to display footer links in the Portal Polaris Footer widget. You can create a menu record and map it to the footer links by including its sys_id in the JSON code. For more information on how to create a menu record, see Menu Item form.
social_links_menu_sys_id	The system identifier (sys_id) of the menu record is used to display social links in the Portal Polaris Footer widget. You can create a menu record and map it to the social links by including its sys_id in the JSON code. For more information on how to create a menu record, see Menu Item form.

Related topics

Portal Polaris Footer widget

Configure the Portal Polaris Footer widget

Web Embeddables reference

Reference topics provide additional information about Web Embeddables.

Key terms referred in Web Embeddables

The following are the key terms referred in Web Embeddables.

Web Embeddables key terms

Term	Description
Global code	Global code is a common script for all the ServiceNow components. It enables you to define component themes, base URLs, authentication callbacks, and locale settings before embedding components onto your website. Additionally, it optimizes component performance by pre-caching the resources required for the components. You must add global code before adding component code onto your website hosting ServiceNow web embeddable components verifying a consistent look and feel, secure communication, and proper localization. Without including this script,

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Web Embeddables key terms (continued)

Term	Description
	your components don't render correctly or function as expected, potentially leading to issues with your user experience and functionality.
Component code	Component code is a component-specific script designed for each component that enables you to define how each component behaves, appears, and integrates within your webpage. The code contains all the necessary logic and functions to ensure the integration and operation of the components in your website's ecosystem. Facilitating the proper display and interaction of the component but also managing dependencies with other components. **Note:** The component code is unique for all ServiceNow components.
CORS (Cross-Origin Resource Sharing) rules	CORS rules are a security mechanism in web browsers designed to control how resources on your webpages are accessed from different domains. This mechanism helps protect your data and resources from unauthorized access. By configuring CORS rules, you can specify and enforce access policies verifying that your embedded components can securely communicate with ServiceNow components. It is crucial for maintaining the integrity and security of your interactions on the website.
Event handler	An event handler lets you configure actions, components, or declarative actions on your website. For example, you can map an event to your component to display an alert notification when the user selects any button on the confirmation message, or you can add an event handler to respond to a record creation failure.
Static preview	The static preview provides a visual representation of your component when a live preview is unavailable. It enables you to understand the component layout and design. However, with static preview enabled, any changes made to global or component properties aren't reflected in the preview in real time. This feature is useful for reviewing components in scenarios where dynamic rendering isn't available. The Static preview is not available for custom and Data visualization component.
Component instance	Enables administrator to save and retrieve configuration of a component embedded on

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Web Embeddables key terms (continued)

Term	Description
	a specific location on the third-party website. Component instances can be renamed, duplicated, and rearranged within the group or across groups.
Group	Enables administrator to model their third-party website structure such as pages or sections. After recreating the website's structure, administrator can add component instances within the group.
Module	A module represents a website with a collection of pages or a section using groups and a collection of components instances embedded on the website. The theme for component instances, external domain URL for CORS, and custom ServiceNow domain for base URL are derived from module meta data.

Functions available in Web Embeddables global and component code

ServiceNow Embeddables API enables you to integrate ServiceNow components into your external websites. These functions provide essential functionality for initialization, authentication, component management, and event handling.

Global code

The embed script includes the following methods as part of the global code. The following details help you understand how they work.

Init method

- **Purpose**: Initializes the embeddables framework with configuration settings.
- **Usage pattern**:

```
await init({
 theme: 'fad87d2ca304121029a4d1aed31e610f', //sys_id
 of theme,
 baseURL: 'https://demo.servicenow.com',
 authCallback: getTokenCallBack, // Authentication
 callback function
       locale: 'ja', // Language/locale for components
       interceptSessionTimeout: true, // Handle
 session timeouts (default: true)
 // cacheComponents: [ //Pre-cache component
 for performance  "sn-embedx-case-form",
 "sn-embedx-case-list", "sn-embedx-case-view" ]
});
```

- **Parameters**:
  - `authCallback` (Function): Returns authentication token for the current user.
  - `baseURL` (String): Base URL of the ServiceNow instance.
  - `locale` (String, optional): Language/locale setting (for example, 'en', 'es') that updates the user's language preference in ServiceNow for authenticated user.
  - `theme` (String): The sys_id of theme to apply.

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- `interceptSessionTimeout` (Boolean, optional): Enable session timeout handling. By default, it is set to `true`.
- `cacheComponents` (Array, optional): List of component tag names to pre-cache.

- **Key behaviors**:
  - Must be called before any other embeddables functions.
  - Loads necessary resources and establishes a connection.
  - Optionally sets up interceptors for session management.
  - Updates the user's language preference for the authenticated user if locale is provided.
  - Pre-caches specified components for improved performance.

login()

- **Purpose**: Authenticates the user with the ServiceNow instance.
- **Usage Pattern**:

```
await login();
```

- **Key behaviors**:
  - Calls the authCallback function provided during initialization.
  - Authenticates with the returned token - Dispatches *SN_EMBEDDABLES_LOGIN_SUCCESS* event on success.
- **Prerequisites:** `init()` must be called first with a valid authCallback - authCallback function must return a valid authentication token.

logout()

- **Purpose**: Logs out the user from ServiceNow session.
- **Usage pattern**:

```
await logout();
```

- **Key behaviors**: Dispatches *SN_EMBEDDABLES_LOGOUT_SUCCESS* event on success.
- **Prerequisite**: `init()` must be called first with valid baseURL - User must be logged in.

Component code

The embed script includes the following methods as part of the component code. The following details help you understand how they work.

getEmbeddables

- **Purpose**: Loads and initializes specified embeddable components.
- **Usage pattern**:

```
// Load components by providing array of component tag
 names
```

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```
getEmbeddables(["sn-embedx-case-view",
 "sn-embedx-case-form"]);
```

- **Parameters**: `components` (Array): Array of component tag names to load

setProperties(componentElement, properties)

- **Purpose**: Sets properties on embeddable component instances.
- **Usage pattern**:

```
const caseViewComponent =
 document.querySelector('sn-embedx-case-view');
setProperties(snEmbedxCaseView,{
  table:sn_customerservice_case,
  sysId:221a69cd3b411300b5c42479b3efc480,
  playbookExperience:playbookExperience,

 selectedPlaybookContextId:85d9f349ff766210e9d3ffffff
fffce,

 selectedStageContextId:9da56770ff7a2210e9d3fffffffff
d9,

 selectedActivityContextId:5d8bf1805d8bf8205d8b54d05d8
be070 });
```

- **Parameters**: `componentElm` (HTMLElement): The component DOM element - properties (Object): Key-value pairs of properties to set.

setEvents (componentElement, eventHandlers)

- **Purpose**: Attaches event listeners to embeddable components.
- **Usage pattern**:

```
const caseViewComponent =
 document.querySelector('sn-embedx-case-view');
const eventHandlers = {'
'SN_EMBEDX_CASE_VIEW#COMPONENT_READY': (e) => {
console.log('Component is ready and usable'); },
'SN_EMBEDX_CASE_VIEW#COMPONENT_ERROR': (e) => { const
{ errorMessage, errorType } = e.detail.payload;
console.log('Component error:', errorMessage,
 errorType); },
};
setEvents(caseViewComponent, eventHandlers);
```

- **Parameters**: `componentElm` (HTML Element): The component DOM element - eventHandlers (Object): Key-value pairs where keys are event names and values are handler functions.

Key considerations

Here are some key considerations to help you implement this effectively:

- Ensure to call init() first. It sets up the foundation for all other functions.
- Use event handlers for the component life-cycle. It also monitor component readiness and errors.

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- Cache frequently used components. Use cacheComponents in init() for better performance.
- Implement

Web Embeddables component properties

Reference topics provide additional information about component properties in Web Embeddables.

Component properties for the Case create

Component properties enable you to configure the behavior of the Case create component instance on a third-party website.

Case create component properties

Component property	Description
Record producer	The system identifier (sys_id) of the record. The default label is `Create case for a product` and sys_id is *`de45c412c312310015519f2974d3ae1b`*.
Prefill fields	Query that automatically populates fields on the form.
Hide record created confirmation	Option to show or hide a confirmation message when a record is submitted. By default, it shows record confirmation message.
Confirmation text	Text appears when the case is submitted successfully on a third-party website.
Confirmation sub-text	Subtext appears when the case is submitted successfully on a third-party website.
Hide reference number	Option to show or hide the reference number of the record on the confirmation message. By default, it shows reference number.
Reference number label	Display label of the reference number on the confirmation message.
Hide primary button	Option to show or hide a primary button on the confirmation message. By default, it shows primary button.
Primary button label	Display label of a primary button on the confirmation message.
Hide secondary button	Option to show or hide a secondary button on the confirmation message. By default, it shows secondary button.
Secondary button label	Display label of a secondary button on the confirmation message.
Hide errors	Option to show or hide error messages for the end user on the third-party website. By default, it shows errors.

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Case create component properties (continued)

Component property	Description
Hide notifications	Option to show or hide component notifications. By default, it shows notification.

Related topics

Configure the Case create component instance

Embed the Case create component instance on the third-party website

Event handlers in the Case create component

Sample code for the Case create component

Component properties for the Case list

Component properties enable you to configure the behavior of the Case list component instance on a third-party website.

Case list component properties

Component property	Description
Hide header	Option to display header and its components. By default, it shows header.
Title	Required title of the Case list component.
Hide record count	Option switch to show or hide the total number of records on the case list. By default, it shows record count.
Hide search	Option switch to show or hide search button on the header. Use the Hide search option to search the case within the case list. By default, it shows search button.
Show filters	Option to show or hide filter button on the header. Use this option to customize the display of cases according to pre-defined filters. By default, it hides filter button.
Hide refresh	Option to show or hide the refresh button the header. Use this option to refresh the case list. By default, it shows a refresh button.
Hide last refreshed text	Option to show or hide a message on the header. Use this option to indicate when the last refresh occurred. By default, it shows last refreshed text.
Table	Table from which the cases or tasks shown on the Case list component. By default, this field is set to the Case [sn_customerservice_case] table.

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Case list component properties (continued)

Component property	Description
	Note: Case list component can show the records from any extended table of case or task table.
Query	Query to filter the case records. The default query shows all cases. **Note:** If no query is provided, all case records are displayed in the Case list component. For more information, see Generate an encoded query string through a filter.
View	Display style for the cases inside the component, chosen from the predefined views.
Columns	Display columns from the case or task table. Select **Add** to add new columns to the case list table. Select ( ) to update and select ( ) to remove column from the case list on the column cards. **Note:** • If both the View and Columns attributes are provided, the fields specified in Columns will be displayed. • If the first column is the reference column, selecting on the case record shows the error in the Case View component.
Disable column resizing	Option to adjust the column width. By default, column resizing is enabled.
Records per page	Option to show or hide the number of records that appear by default on the case list. The default value is 20.
Hide errors	Option to show or hide error messages for the end user on the third-party website. By default, it shows errors.
Hide when empty	Option to show or hide the component when there are no cases to display. By default, it shows empty list when there are no cases. **Note:** This property is honored when the component initially loads. If no matching records are found for searches or query filters afterward, an empty state is shown regardless of the attribute's value.

Related topics

Configure the Case list component instance

Embed the Case list component instance on the third-party website

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Event handler in the Case list component

Sample code for the Case list component

Component properties for the Case view

Component properties enable you to configure the behavior of the Case view component instance on a third-party website.

Case view component properties

Component property	Description
Table	Table from which the case or task shown on the Case view component. By default, this field is set to the Case [sn_customerservice_case] table. **Note:** Case view component can show the records from any extended table of case or task table.
Record ID	The system identifier (sys_id) of the record from the specified table.
Header configuration	Display different fields from the record in the header. The details display on the header are defined in the UX Header Configurations [sys_ux_header_config] table. The default label is `Embedded Experiences Case view Header Configuration` and sys_id is (1db45f9118520210f8775b8843daf927).
Hide actions	Option to show or hide the action button on the header. By default, the header displays all actions.
Action configuration	Display different actions available for the record from the UX Actions Configuration [sys_ux_action_config]. The default label is 'Embedded Experiences Case view Action Configuration' and sys_id is (b226535518520210f8775b8843daf9fb). **Note:** If the Action configuration field is empty, all actions are hidden.
Hide activity	Option to show or hide past activities associated with your record, starting with the most recent. By default, it shows activity tab.
Hide attachments	Option to show or hide attachment tab on the case detailed view. By default, it shows attachment tab.
Hide all related lists	Option to show or hide related lists on the case detailed view. By default, it shows all related lists.
Table view	Table view is used to identify the related lists associated with the record.
Show custom tab	Option to show or hide custom tab. By default, it hides custom tab.

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Case view component properties (continued)

Component property	Description
Hide playbook process tab	Option to hide the process tab which is displayed when a playbook is available for the record.
Playbook experience	Select a playbook experience to use. If not selected, the Global Playbook Experience is used.
Hide playbook stages	Option to hide playbook stages to display activities of the current stage.
Playbook stage orientation	Horizontal orientation displays playbook stages horizontally and activities vertically. Vertical orientation displays playbook stages vertically and activities nested within each stage.
Visible horizontal playbook stages	Displays the number of stages visible in the horizontal stage picker for the playbook without scrolling.
Playbook activity view mode	View mode for displaying playbook activities in a stacked or focused layout.
Hide errors	Option to show or hide error messages for the end user on the third-party website. By default, it shows errors.

Related topics

- Configure the Case view component instance
- Embed the Case view component instance on the third-party website
- Event handler in the enhanced Case view component
- Sample code to handle the Case view component

Component properties for the Catalog item

Component property enables you to configure the behavior of the Catalog item component instance on the third-party website.

Catalog item component properties

Component property	Description
Catalog item	The system identifier (sys_id) of the catalog item from the Record Producer [sc_cat_item_producer] table. The default label is `Create Contact` and sys_id is *`56c62944c30102003d3b7bfaa2d3ae36`*.

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Catalog item component properties (continued)

Component property	Description
Hide additional details	Hides the delivery address and special instructions fields.
Prefill fields	Query that automatically populates fields on the form.
Hide record created confirmation	Option to show or hide a confirmation message when a record is submitted. By default, it shows record confirmation message.
Custom illustration size	Size of the illustration asset to use. If you select auto, the component chooses the appropriate illustration based on the current size of the now-illustration component.
Confirmation text	Text appears when the case is submitted successfully on a third-party website.
Confirmation sub-text	Subtext appears when the case is submitted successfully on a third-party website.
Hide reference number	Option to show or hide the reference number of the record on the confirmation message. By default, it shows reference number.
Reference number label	Display label of the reference number on the confirmation message.
Hide primary button	Option to show or hide a primary button on the confirmation message. By default, it shows primary button.
Primary button label	Display label of a primary button on the confirmation message. The default text is `View details`.
Hide secondary button	Option to show or hide a secondary button on the confirmation message. By default, it shows secondary button.
Secondary button label	Display label of a secondary button on the confirmation message.
Hide errors	Option to show or hide error messages for the end user on the third-party website. By default, it shows errors.
Hide notification	Option to show or hide component notifications. By default, it shows notification.

Related topics

Configure the Catalog item component instance

Embed the Catalog item component instance on the third-party website

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Event handler in the Catalog item component

Sample code for the Catalog item component

Component properties for the Data visualization

Component properties enable you to configure the behavior of the Data visualization component instance on the third-party website.

Data visualization component: Donut, semi-donut, and pie charts properties

Component property	Description
Data visualization type	Display type of data visualization chart for the component.
Show header	Option to display the visualization header, including title and icons.
Show header separator	Option to display a line separating the header from the rest of the component.
Chart title	Title for the visualization.
Description	Description for your component.
Wrap title	Option to wrap long titles onto a second line. If cleared, an ellipsis is displayed to truncate the long title.
Show border	Option to display a line around the component.
Sort by	Sorts groups or categories in the specified order. Currently, you can sort by value or name.
Sort by order	Sorts groups or categories in ascending or descending order.
Show total value	Option to show the total value. This field doesn't apply to pie chart.
Show metric label	Option to show the metric label. This field doesn't apply to pie chart.
Drill down label	Text displayed in the tooltip to help users understand what will happen upon selecting.
Show selected data point	Option to show the data point that has been selected. It's commonly used when the chart functions as a filter.
Refresh requested	A value that triggers a data refresh. The refresh occurs only if the new value of this property is different from the previous one.
Show legend	Option to display the legend.
Show legend value	Option to display the value corresponding to the area of the chart you hover on. The value is displayed as a tooltip and in the chart legend.
Legend position	Position of the legend relative to the chart. Currently, you can set the location to above, below, right, or left.

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Data visualization component: Donut, semi-donut, and pie charts properties (continued)

Component property	Description
Legend orientation	The orientation of the legend. Currently, you set it either horizontal or vertical.
Horizontal alignment	The horizontal alignment of elements in the legend. Currently, you can set it to start, center, or end.
Max legend item width, px	Defines number of pixels after which the item of the legend will be truncated.
Expand legend vertically	Option that enables the legend to expand as needed to fit the content without scrolling, instead of being limited to two lines.
Show data labels	Option to display the score of each data point.
Set color type	Determines the color for the chart. You can set color type to default, color palette, or fixed element color.

Data visualization component: Singe score properties form

Component property	Description
Data visualization type	Display type of data visualization chart for the component.
Show header	Option to display the visualization header, including title and icons.
Show header separator	Option to display a line separating the header from the rest of the component.
Chart title	Title for the visualization chart.
Description	Description for your component.
Wrap title	Option to wrap long titles onto a second line. If unchecked, an ellipsis is displayed to truncate the long title.
Show border	Option to display a line around the component.
Sort by	Sorts groups or categories in the specified order. Currently, you can sort by value or name.
Sort by order	Sorts groups or categories in ascending or descending order.
Show total value	Option to show the total value.
Show metric label	Option to display the metric label.
Show score update time	Option to display the time of the last update of the single score.
Show 0 when no data available	Option to display format when there's no value in the selected dataset or configuration.
Refresh requested	A value that triggers a data refresh. The refresh occurs only if the new value of this property is different from the previous one.

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Data visualization component: Singe score properties form (continued)

Component property	Description
Score size	Size of the score. Currently, you can set size to auto, xs, s, m, l, xl, or xxl.
Score icon	An icon is to be shown in front of the score value. You can either search from the available images or upload custom images.
Alignment	Add icon to be shown in front of the score value
Set color type	Determines the color for the chart. You can set color type to default, or single color.

Related topics

- Configure the Data visualization component instance
- Embed the Data visualization component instance on the third-party website
- Event handler in the Data visualization component
- Sample code for the Data visualization component

Component properties for the Knowledge article view

Component property enables you to configure the behavior of the Knowledge article view component instance on the third-party website.

Knowledge article view properties

Component property	Description
Record ID	Sys ID of the record.
Hide header	Option to show or hide the article header and its components.
Hide language selector	Option to show or hide the language selector when multiple languages are available for the article.
Hide author information	Option to show or hide author information from article.
Hide reading time	Option to show or hide the reading time on the article header.
Hide last updated	Option to show or hide the last updated time on the article header.
Hide view count	Option to show or hide the view count on the article header.
Hide average rating	Option to show or hide the average rating on the article header.
Hide attachments	Option to show or hide article attachments.
Hide helpful option	Option to show or hide the feedback option on the article page.
Hide article rating	Option to show or hide the option to rate the article.
Disable displaying latest article version	Option to show or hide the article version based on the article sys ID.
Hide errors	Option to show or hide the error messages from end user when the component fails to load initially.
Hide notifications	Option to show or hide the notifications from end user.

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Related topics

Configure the Knowledge article view component instance

Embed the Knowledge article view component instance on the third-party website

Event handler in the Knowledge article view component

Sample code for the Knowledge article view component

Component properties for the Playbook intake

Component properties enable you to configure the behavior of the Playbook intake component instance on the third-party website.

Playbook intake properties

Component property	Description
Table	Table in which the record is created.
Record generator	Playbook record generator used to create the record for which the playbook is defined.
Prefill fields	Query that automatically populates fields on the Playbook case form. Example account = Solana^state=draft. The query overrides all the template fields configured on the record generator.
Playbook experience	Optionally, select a playbook experience to use. If not selected, the Global Playbook Experience is used.
Title	Title of the playbook intake form. Title will be replaced by case number if there's no short description after record is created.
Hide stages	Option to hide playbook stages to display activities of the current stage.
Stage orientation	Horizontal orientation displays playbook stages horizontally and activities vertically. Vertical orientation displays playbook stages vertically and activities nested within each stage.
Visible horizontal stages	Displays the number of stages visible in the horizontal stage picker for the playbook without scrolling.
Activity orientation	When **Hide stages** option is enabled, activities can be displayed as Vertical focused or Vertical stacked. When stages are hidden, Horizontal display is also available. **Note:** The is applicable for desktop only.
Hide record creation confirmation	Option to hide the confirmation page after the record is created and opens the Playbook case view page.
Confirmation text	Confirmation text when the record is submitted successfully.
Confirmation sub-text	Confirmation subtext when the record is submitted successfully.

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Playbook intake properties (continued)

Component property	Description
Hide reference number	Option to hide reference number of the record on the confirmation message.
Reference number label	Display text for the reference number label on the confirmation message.
Hide primary button	Option to hide the primary button on the confirmation message.
Primary button label	Display text for the primary button label.
Hide secondary button	Option to hide the secondary button on the confirmation message.
Secondary button label	Display text for the secondary button label.
Hide errors	Option to hide the error messages from end user when the component fails to load initially.

Related topics

- Configure the Playbook intake component instance
- Embed the Playbook intake component instance on the third-party website
- Event handler in the Playbook intake component
- Sample code for the Playbook intake component

Component properties for the Catalog browse

Component property enables you to configure the behavior of the Catalog browse component on the third-party website.

Catalog browse properties form

Component property	Description
Selection type	Display catalog item by either selecting catalogs or categories. Based on your selection, you can enter sys_ids of either catalogs or categories. If you want to display specific categories, select type= categories. When catalog is selected all its categories is displayed. The default selection is **Catalog**.
Select catalogs	Enter the sys_id of the catalogs whose catalog items you want to display. The default sys_ids for Select catalogs are: e0d08b13c3330100c8b837659bba8fb4,742ce428d7211100f2d224837e61036d. These sys_ids are part of service catalog and technical catalog.

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Catalog browse properties form (continued)

Component property	Description
Select categories	Enter the sys_id of the categories whose categories items you want to display. This field appears when you select **Category** in the **Selection type** field. The default sys_ids are: 22555319db0150104327198d1396195c, 109f0438c6112276003ae8ac13e7009d,2809952237b1300054b6a3549dbe5dd4. These sys_ids are part of application and account access services software.
Hide price	Option to show or hide the item prices if available.
Hide navigation panel	Option to show or hide the navigation panel from users.
Hide popular requests	Option to show or hide the **Popular requests** quick action.
Hide recent requests	Option to show or hide the **Recently requested by you** quick action.

Related topics

- Configure the Catalog browse component instance
- Embed the Catalog browse component on the third-party website
- Event handlers in the Catalog browse component
- Sample code for the Catalog browse component

Component properties for the Object list

Component property enables you to configure the behavior of the Object list component on a third-party website.

Object list properties - Data

Component property	Description
Type	All Records shows the complete list with options to edit, filter, and take bulk actions. Top Records shows a prioritized, read-only list with a view all link.
Table	Table data to display in the list.
Edit query	Query filters to refine the list results. These filters cannot be modified.
Edit default filter	Users can edit or remove this filter. When a query is set, it adds more conditions to narrow down the displayed records.
Columns	Select columns to be displayed. If both columns and List view are chosen, columns take priority.

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Object list properties - Data (continued)

Component property	Description
List view	Uses preconfigured columns from the UI view table. If both columns and a list view are selected, columns take priority.
Nest by	Column used to define the hierarchy. If this property is not set, the list is displayed as a flat list.
Default group by	Group records by a specific column. User can choose to group by another column.
Hide when empty	Enable to hide the component when there are no records to show for the user.

Object list properties - Header

Component property	Description
Hide header	Option to show or hide the header.
Title	Displays the title of the list. You can set a custom title or use the table name as the default title.
Subtitle	Subtitle to display near the title. When empty, no subtitle will be displayed.
Hide record count	Option to show or hide the count badge on the header.
Hide search	Option to show or hide the search bar. Search works only for indexed tables.
Hide filters	Option to show or hide the filter with condition-builder.
Disable column selection	Option to disable or enable column selection and arrangement.
Hide actions	Option to show or hide the action buttons.
Action config	Global actions and actions set at the table or view level will automatically be displayed. To display additional actions specific to this component, select an **Action Config** record.

Object list properties - Columns

Component property	Description
Disable clickable records	When unchecked, values in the first column appear as clickable links to open record details.
Enable clickable reference records	When checked, values in the reference column appear as clickable links to open the related record details.
Disable column highlighting	When unchecked, column values are highlighted.
Highlighted value config	Select UX Highlighted Value Configuration record that defines which fields and values to highlight.

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Object list properties - Rows

Component property	Description
Disable quick edit	When unchecked, users with required permissions can edit the records.

Object list properties - Cell

Component property	Description
Disable cell wrapping	When unchecked, automatically moves content to a new line within a cell when it exceeds the cell's width. Long text may still be truncated.
Max cell characters	Displays number of characters in each cell before truncation.
Disable cell editing	Option to allow inline editing of cell.

Object list properties - Footer

Component property	Description
Records per page	Allows user to choose the number of records displayed on each page.
Visible page range	Sets how many page numbers are shown between navigation arrows.
Limit records fetched	Limit the total records fetched across all pages to improve component performance. Higher values may increase load times. Leave it empty to fetch all records.
Hide errors	Option to show or hide the error messages from end user when the component fails to load initially.

Related topics

- Configure the Object list component instance
- Embed the Object list component on the third-party website
- Event handlers in the Object list component
- Sample code for the Object list component

Web Embeddables event handlers

Reference topics provide additional information about Web Embeddables.

An event handler lets you configure actions, components, or declarative actions on your website. For example, you can map an event to your component to display an alert notification when the user selects any button on the confirmation message, or you can add an event handler to respond to a record creation failure.

Event handlers in the Case create component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

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Event handlers in the Case create component

Event handler	Description	Payload
SN_EMBEDX_CASE_FORM#COMPONENT_READY	This event is dispatched when a component is ready and usable.	None
SN_EMBEDX_CASE_FORM#COMPONENT_ERROR	This event is dispatched when a property validation or internal error occurs.	`errorMessage`, `errorType`
SN_EMBEDX_CASE_FORM#BUTTON_CLICKED	This event is dispatched if any button is selected the confirmation message.	`table`, `record_sys_id`, `button_variant`
SN_EMBEDX_CASE_FORM#RECORD_CREATION_SUCCEEDED	This event is dispatched if the record was successfully created.	`table`, `record_sys_id`
SN_EMBEDX_CASE_FORM#RECORD_CREATION_FAILED	This event is dispatched if the record creation has failed.	None
SN_EMBEDX_CASE_FORM#COMPONENT_NOTIFICATION_SENT	This event is dispatched when the component provides a notification for the end user.	`item`

Related topics

Configure the Case create component instance

Embed the Case create component instance on the third-party website

Component properties for the Case create

Sample code for the Case create component

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Event handler in the Case list component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Event handlers in the Case list component

Event handler	Description	Payload
SN_EMBEDX_CASE_LIST#RECORD_SELECTED	This event is dispatched when a record is selected. **Note:** If the first column is the reference column, selecting the case record shows the error in the Case view component.	`table`, `record_sys_id`
SN_EMBEDX_CASE_LIST#COMPONENT_READY	This event is dispatched when a component is ready and usable.	None
SN_EMBEDX_CASE_LIST#COMPONENT_ERROR	This event is dispatched when a property validation or internal error occurs.	`errorMessage`, `errorType`

Related topics

- Configure the Case list component instance
- Embed the Case list component instance on the third-party website
- Component properties for the Case list
- Sample code for the Case list component

Event handler in the enhanced Case view component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on third-party webpage.

Events triggered by the component

Event handler	Description	Payload
SN_EMBEDX_CASE_VIEW#COMPONENT_READY	This event is dispatched when a component is ready	None

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Events triggered by the component (continued)

Event handler	Description	Payload
	and usable.	
SN_EMBEDX_CASE_VIEW#COMPONENT_ERROR	This event is dispatched when a property validation or internal error occurs.	`errorMessage, errorType`
SN_EMBEDX_CASE_VIEW#CASE_COMMENT_ADDED	This event is dispatched when a comment is added in the activity stream.	None
SN_EMBEDX_CASE_VIEW#RELATED_RECORD_SELECTED	This event is dispatched when a record of related list is selected.	`table, record_sys_id, ref`
Additional events		
SN_EMBEDX_CASE_VIEW#ACTIVITY_SELECTED	This event is dispatched when an activity is selected.	`playbookContextId, stageContextId, activityContextId`
SN_EMBEDX_CASE_VIEW#STAGE_SELECTED	This event is dispatched when a stage is selected.	`playbookContextId, stageContextId`
SN_EMBEDX_CASE_VIEW#FILTER_OPTION_SELECTED	This event is dispatched when a filter option is selected.	`playbookContextId, item`
SN_EMBEDX_CASE_VIEW#ACTIVITY_STATE_CHANGED	This event is dispatched	`playbookContextId, stageContextId, activityContextId`

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Events triggered by the component (continued)

Event handler	Description	Payload
	when the activity's state changes.	
SN_EMBEDX_CASE_VIEW#OPEN_RECORD	This event is dispatched when an open record event is fired.	`table, sys_id, params, query`
SN_EMBEDX_CASE_VIEW#PLAYBOOK_EXPANDED	This event is dispatched when the playbook chevron is expanded.	`playbookContextId, updatedExpandState`
SN_EMBEDX_CASE_VIEW#UPDATE_SELECTION	This event is dispatched when an activity is completed.	`selectedPlaybook, selectedStage, selectedActivity`
SN_EMBEDX_CASE_VIEW#OPEN_LIST	This event is dispatched when an open list event is fired.	`table, listTitle, query, disableInlineEditing, listView`
SN_EMBEDX_CASE_VIEW#USER_INTERACTION	This event is dispatched when the user interacts with any element on playbook.	`playbookContextId, parentTable, parentRecord, stageName, stageTitle, stageState, activityTitle, activityContextId, associatedRecord, associatedTable`
SN_EMBEDX_CASE_VIEW#FILTER_SELECTED	This event is dispatched when a filter is selected.	`playbookContextId, value`

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Event handler in the Catalog item component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Event handlers in the Catalog item component

Event handler	Description	Payload
SN_EMBEDX_CATALOG_ITEM_FORM #COMPONENT_READY	This event is dispatched when a component is ready and usable.	N/A
SN_EMBEDX_CATALOG_ITEM_FORM #COMPONENT_ERROR	This event is dispatched when a property validation or internal error occurs.	`errorMessage`, `errorType`
SN_EMBEDX_CATALOG_ITEM_FORM #BUTTON_CLICKED	This event is dispatched if any button is selected the confirmation message.	`table`, `record_sys_id`, `button_variant`
SN_EMBEDX_CATALOG_ITEM_FORM #RECORD_CREATION_SUCCEEDED	This event is dispatched if the record was successfully created.	`table`, `record_sys_id`
SN_EMBEDX_CATALOG_ITEM_FORM #RECORD_CREATION_FAILED	This event is dispatched if the record creation has failed.	N/A
SN_EMBEDX_CATALOG_ITEM_FORM #COMPONENT_NOTIFICATION_SENT	This event is dispatched when the component provides a notification for the end user.	`items`

Related topics

- Configure the Catalog item component instance
- Embed the Catalog item component instance on the third-party website
- Component properties for the Catalog item
- Sample code for the Catalog item component

Event handler in the Data visualization component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Event handlers in Data visualization component

Event handler	Description	Payload
NOW_VIS_WRAPPER#PROPERTY_OVERRIDE	This event is dispatched when the visualization overrides its property. For example, when the user selects a different group by from the alternative group by selection.	`properties`

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Event handlers in Data visualization component (continued)

Event handler	Description	Payload
NOW_VIS_WRAPPER#SELECTED	This event is dispatched when the user selects order-selects element on data visualizations, typically to filter other content on the page.	`title, type, isSelected, params, data`
NOW_VIS_WRAPPER#CLICKED	This event is dispatched when the visualization is selected.	`title, type, params, data`

Related topics

Configure the Data visualization component instance

Embed the Data visualization component instance on the third-party website

Component properties for the Data visualization

Sample code for the Data visualization component

Event handler in the Knowledge article view component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Event handlers in the Knowledge article view component

Event handler	Description	Payload
SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW #LANGUAGE_DROPDOWN_CLICKED	This event is dispatched when the user selects a language or version from the drop-down to open another article.	`articleID`
SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW #RATING_CLICKED	This event is dispatched when the user provides a star rating for the article.	`rating`
SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW #LINK_CLICKED	This event is dispatched when a link within the article body is selected.	`table, sys_id`
SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW #COMPONENT_ERROR	This event is dispatched when an error occurs while loading the article content.	`errorMessage, errorType`
SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW #COMPONENT_READY	This event is dispatched when the component is ready and usable.	None
SN_EMBEDX_KNOWLEDGE_ARTICLE_VIEW #NOTIFICATION_LINK_CLICKED	This event is dispatched when link present on notification has been selected.	`table, sys_id`

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Related topics

Configure the Knowledge article view component instance

Embed the Knowledge article view component instance on the third-party website

Component properties for the Knowledge article view

Sample code for the Knowledge article view component

Event handler in the Playbook intake component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Event handlers in the Playbook intake component

Event handler	Description	Payload
SN_EMBEDX_PLAYBOOK_INTAKE #COMPONENT_READY	This event is dispatched when a component is ready and usable.	None
SN_EMBEDX_PLAYBOOK_INTAKE #COMPONENT_ERROR	This event is dispatched when a property validation or internal error occurs.	`errorType, errorMessage`
SN_EMBEDX_PLAYBOOK_INTAKE #RECORD_CREATION_SUCCEEDED	This event is dispatched when a record is created by a Record Generator Playbook.	`table, sysId, number, playbook_experience_id, hide_record_creation`
SN_EMBEDX_PLAYBOOK_INTAKE #PRIMARY_BUTTON_CLICKED	This event is dispatched when the primary button is selected the record created confirmation page.	`table, record_sys_id, playbook_experience_id`
SN_EMBEDX_PLAYBOOK_INTAKE #SECONDARY_BUTTON_CLICKED	This event is dispatched when the secondary button is selected on the record created confirmation page.	`table, record_sys_id`
Additional event handlers		
SN_EMBEDX_PLAYBOOK_INTAKE #OPEN_LIST	This event is dispatched when an open list event is fired.	`table, listTitle, query, disableInlineEditing, listView`
SN_EMBEDX_PLAYBOOK_INTAKE #ACTIVITY_SELECTED	Select the provided playbook, stage, and activity by context ID.	`playbookContextId, stageContextId, activityContextId`

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Event handlers in the Playbook intake component (continued)

Event handler	Description	Payload
SN_EMBEDX_PLAYBOOK_INTAKE #ACTIVITY_STATE_CHANGED	This event is dispatched by Playbook Custom Layout Controller when playbook activity state has changed to either Complete, Skipped, canceled, or Error.	`playbookContextId, stageContextId, activityContextId`
SN_EMBEDX_PLAYBOOK_INTAKE #STAGE_SELECTED	Select the provided playbook and stage by context ID.	`playbookContextId, stageContextId`
SN_EMBEDX_PLAYBOOK_INTAKE #UPDATE_SELECTION	This event is dispatched by the Playbook Custom Layout Controller when the selected state of a playbook, stage, or activity has changed.	`selectedPlaybook, selectedStage, selectedActivity`
SN_EMBEDX_PLAYBOOK_INTAKE #FILTER_SELECTED	This event is dispatched when playbook filter is opened or closed.	`playbookContextId, value`
SN_EMBEDX_PLAYBOOK_INTAKE #USER_INTERACTION	This event is dispatched on User interaction with a Playbook Activity.	`playbookContextId, parentTable, parentRecord, stageName, stageTitle, stageState, activityTitle, activityContextId, associatedTable, associatedRecord`
SN_EMBEDX_PLAYBOOK_INTAKE #OPEN_RECORD	This event is dispatched when an open record event is fired.	`table, sys_id, params, query`
SN_EMBEDX_PLAYBOOK_INTAKE #FILTER_OPTION_SELECTED	This event is dispatched when an item is selected the playbook filter.	`playbookContextId, item`
SN_EMBEDX_PLAYBOOK_INTAKE #PLAYBOOK_EXPANDED	This event is dispatched when the playbook stage list changes expanded state.	`playbookContextId, updatedExpandState`

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Related topics

- Configure the Playbook intake component instance
- Embed the Playbook intake component instance on the third-party website
- Component properties for the Playbook intake
- Sample code for the Playbook intake component

Event handlers in the Catalog browse component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Catalog browse event handlers

Event handler	Description
CATALOG_BROWSE#COMPONENT_READY	This event is dispatched when a component is ready and usable.
CATALOG_BROWSE#CATALOG_ITEM_SELECTED	This event is dispatched when a catalog item is selected.
'CATALOG_BROWSE#COMPONENT_EMPTY	This event is dispatched when a component has nothing to display.
CATALOG_BROWSE#COMPONENT_ERROR	This event is dispatched when a component encounters an error.

Related topics

- Configure the Catalog browse component instance
- Embed the Catalog browse component on the third-party website
- Sample code for the Catalog browse component
- Component properties for the Catalog browse

Event handlers in the Object list component

A component triggers an event when a certain condition is met or on user interaction. The event can be used to execute an action through a code on a third-party webpage.

Object list event handlers

Event handler	Description
N_EMBEDX_OBJECT_LIST#FOOTER_LINK_SELECTED	This event is dispatched when footer link is selected.
N_EMBEDX_OBJECT_LIST#COMPONENT_ERROR	This event is dispatched when a property validation or internal error occurs.
SN_EMBEDX_OBJECT_LIST#RECORD_SELECTED	This event is dispatched when a record is selected.
N_EMBEDX_OBJECT_LIST#COMPONENT_READY	This event is dispatched when a component is ready and usable.

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Related topics

- Configure the Object list component instance
- Embed the Object list component on the third-party website
- Component properties for the Object list
- Sample code for the Object list component

Web Embeddables component events

Events that Web Embeddables components trigger to track user interactions and component state changes on your third-party websites.

Case list event details

Event name	Description
[WE] Case List - Component Ready	Triggers when the Case list macroponent has fully loaded and is ready for user interaction.
[WE] Case List - Component Error	Triggers when the Case list macroponent encounters an error during initialization or data loading or internet error.
[WE] Case List- Record Selected	Triggers when a user selects a record in the case list component.
[WE] Case List - Filter Applied	Triggers when a user applies a filter to the case list records.
[WE] Case List - Search Applied	Triggers when a user performs a search within the case list.

Case view event details

Event name	Description
[WE] Case View - Component Ready	Triggers when the Case view macroponent has fully loaded and is ready for user interaction.
[WE] Case View - Component Error	Triggers when the Case view macroponent encounters an error during initialization or data loading or internet error.
[WE] Case View - Comment Added	Triggers when a user adds a comment or work note to the case record.
[WE] Case View - Playbook Activity Selected	Triggers when a user selects a specific activity within a playbook.
[WE] Case View - Playbook Stage Selected	Triggers when a user selects or navigates to a specific stage within a playbook.
[WE] Case View - Playbook Activity State Changed	Triggered when the state of a playbook activity changes for example, from 'Not Started' to 'In Progress' or 'Completed'.
[WE] Case View - Related List Filter Applied	Triggers when a user applies a filter to a related list within the case view.
[WE] Case View - Playbook Interaction	Triggers when a user interacts with any playbook element in the case view.
[WE] Case View - Related List Record Selected	Triggered when a user selects a record from a related list within the case view.

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Case create event details

Event name	Description
[WE] Case Create - Component Ready	Triggers when the Case create macroponent has fully loaded and is ready for user input.
[WE] Case Create - Component Error	Triggers when the Case create macroponent encounters an error during initialization or internet error.
[WE] Case Create - Record Creation Succeeded	Triggers when a new case record is successfully created.
[WE] Case Create - Record Creation Failed	Triggers when an attempt to create a case record fails due to validation errors or system issues.
[WE] Case Create - Primary Button Selected	Triggers when the user selects the primary action button after the case creation
[WE] Case Create - Secondary Button Selected	Triggers when the user selects a secondary action button after the case creation

Catalog item event details

Event name	Description
[WE] Catalog Item - Component Ready	Triggers when the Catalog item macroponent has fully loaded and is ready for user interaction.
[WE] Catalog Item - Component Error	Triggers when the Catalog item macroponent encounters an error during initialization or data loading or internet error.
[WE] Catalog Item - Record Creation Succeeded	Triggers when a catalog item request is successfully submitted.
[WE] Catalog Item - Record Creation Failed	Triggers when submitting a catalog item request fails due to validation errors or system issues.
[WE] Catalog Item - Primary Button Selected	Triggers when the user selects the primary action button after creation.
[WE] Catalog Item - Secondary Button Selected	Triggers when the user selects a secondary action button after creation.

Knowledge article view event details

Event name	Description
[WE] Knowledge Article View - Component Ready	Triggers when the Knowledge article view macroponent has fully loaded and is ready for user interaction.
[WE] Knowledge Article View - Component Error	Triggers when the Knowledge article view macroponent encounters an error during initialization or data loading or internet error.
[WE] Knowledge Article View - Language Selected	Triggers when a user selects a different language version of the knowledge article.
[WE] Knowledge Article View - Star Rated Article	Triggers when a user provides a star rating for the knowledge article.

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Knowledge article view event details (continued)

Event name	Description
[WE] Knowledge Article View - Link selected	Triggers when a user selects a hyperlink within the knowledge article content.
[WE] Knowledge Article View - Helpful Question Selected	Triggers when any link in the notification is selected. In scenario of Latest version of the article available link

Playbook intake event details

Event name	Description
[WE] Playbook Intake - Component Ready	Triggers when the Playbook intake macroponent has fully loaded and is ready for user interaction.
[WE] Playbook Intake - Component Error	Triggers when the Playbook intake macroponent encounters an error during initialization or internet error.
[WE] Playbook Intake - Record Creation Succeeded	Triggers when a record created through the playbook intake process is successfully saved.
[WE] Playbook Intake - Activity Selected	Triggers when a user selects a specific activity within the playbook intake flow.
[WE] Playbook Intake - Stage Selected	Triggers when a user navigates to or selects a specific stage in the playbook intake process.
[WE] Playbook Intake - Playbook Interaction	Triggers when a user interacts with any element within the playbook intake interface.
[WE] Playbook Intake - Primary Button Selected	Triggers when the user selects the primary action button in the playbook intake
[WE] Playbook Intake - Secondary Button Selected	Triggers when the user selects a secondary action button in the playbook intake

Object list event details

Event name	Description
[WE] Object List - Component Ready	Triggers when the Object list macroponent has fully loaded and is ready for user interaction.
[WE] Object List - Component Error	Triggers when the Object list macroponent encounters an error during initialization or data loading or internet error.
[WE] Object List - Record Selected	Triggers when a user selects a specific record from the object list.
[WE] Object List - Filter Applied	Triggers when a user applies a filter within the object list.
[WE] Object List - Search Applied	Triggers when a user performs a search within the object list.
[WE] Object List - Pagination Navigated	Triggers when a user navigates to a different page of results.

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Object list event details (continued)

Event name	Description
[WE] Object List - Hierarchical List Expanded Collapsed	Triggers when a user expands or collapses a hierarchical node in the object list (for tree-structured data).
[WE] Object List - Footer Link Selected	Triggers when a user selects a link in the footer of the object list, for example, **View All**.

Portal reference

Customer, consumer, and business portal reference topics provide additional information about form fields, user roles and others.

Business Portal user roles

Different roles allow customers to create and edit cases and manage users from the Business portal.

Business Portal user roles

User role	What this user can do on the Business Portal
Customer [sn_customerservice.customer]	• Create a case for this user's account. • View a list of cases created by this user. • Edit cases created by this user. • Search for information.
Customer case manager [sn_customerservice.customer_case_manager]	• Create a case for this user's account and for child accounts. • View a list of cases created by this user and view cases for child accounts. • Edit cases created by this user and edit cases for child accounts. • Search for information. • Create a case on behalf of another contact in this account. • View a list of cases belonging to this account. • Edit cases belonging to the account. **Note:** The customer case manager role is not automatically added to the **sn_customerservice.contact_role_assignment** system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.

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Business Portal user roles (continued)

User role	What this user can do on the Business Portal
Customer administrator [sn_customerservice.customer_admin]	• Create a case for this user's account. • Create a case on behalf of another contact for this account. • View a list of cases belonging to this account. • Edit cases belonging to this account. • Search for information. • Manage users for this account.
Partner [sn_customerservice.partner]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this user. • Edit cases belonging to this user. • Search for information.
Partner administrator [sn_customerservice.partner_admin]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this account and to customer accounts. • Edit cases belonging to this account and to customer accounts. • Manage users for this account and for customer accounts.

Related topics

Setup Business and Consumer Portal

Customer Orders form

The following table describes the fields available on the Customer Orders form.

Customer Orders form

Field	Description
Keyword Search	Search bar to filter customer orders using keywords like Order Number or Name.
Number	Unique identifier for each customer order.
Short description	Brief summary for the order.
Account	Customer account that is linked to the order.
Contact	Primary contact person for the order.

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Customer Orders form (continued)

Field	Description
Channel partner	Channel partner associated with the customer order.
Order date	Date and time when the order was created.
Status	Current status of the order.

Related topics

Track customer orders on the Business Location Service Portal

Walk-up Experience for CSM user roles

Walk-up Experience roles for different users who interact with in-person support queues.

Walk-up Experience for CSM user roles

Role Name	Role	Description
sn_walkup.walkup_login	Store representative	Helps requester check in at the walk-up location.
sn_csm_walkup.walkup_technician	CSM walk-up technician	Fulfills user demands at the CSM walk-up location.
sn_csm_walkup.walkup_manager	CSM walk-up manager	Manages the team at the walk-up location.
sn_csm_walkup.walkup_admin	CSM walk-up administrator	Administers walk-up interactions, location queues, and walk-up reasons.

Related topics

Activate Walk-up Experience for Customer Service Management

Customer Service Portal user roles

Several different roles allow customers to create and edit cases and manage users from the customer portal.

Customer Service Portal user roles

User role	What this user can do on the Customer Service Portal
Customer [sn_customerservice.customer]	• Create a case for this user's account. • View a list of cases created by this user. • Edit cases created by this user. • View a list of assets belonging to this user's account. • Search for information.

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Customer Service Portal user roles (continued)

User role	What this user can do on the Customer Service Portal
Customer case manager [sn_customerservice.customer_case_manager]	• Create a case for this user's account and for child accounts. • View a list of cases created by this user and view cases for child accounts. • Edit cases created by this user and edit cases for child accounts. • View a list of assets belonging to this user's account and to child accounts. • Search for information. • Create a case on behalf of another contact in this account. • View a list of cases belonging to this account. • Edit cases belonging to the account. **Note:** The customer case manager role is not automatically added to the **sn_customerservice.contact_role_assignment** system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.
Customer administrator [sn_customerservice.customer_admin]	• Create a case for this user's account. • Create a case on behalf of another contact for this account. • View a list of cases belonging to this account. • Edit cases belonging to this account. • View a list of assets belong to this user's account. • Search for information. • Manage users for this account.
Partner [sn_customerservice.partner]	• Create a case for this user's account. • Create a case on behalf of customer accounts. • View a list of cases belonging to this user. • Edit cases belonging to this user. • View a list of assets belong to this user's account. • Search for information.
Partner administrator [sn_customerservice.partner_admin]	• Create a case for this user's account. • Create a case on behalf of customer accounts.

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Customer Service Portal user roles (continued)

User role	What this user can do on the Customer Service Portal
	• View a list of cases belonging to this account and to customer accounts. • View a list of assets belong to this account and to customer accounts. • Edit cases belonging to this account and to customer accounts. • Manage users for this account and for customer accounts.

Related topics

Multi-factor authentication for Customer and Consumer Service Portals

Consumer Service Portal properties

Properties that the system administrator can set to limit the number of registered products per consumer, the number of open cases per consumer, and the number of attachments per consumer record.

Consumer Service Portal properties

Property	Description
consumer_max_attachments_per_record	Maximum consumer attachable items per record. • **Type**: integer • **Default value**: 5 • **Location**: **Customer Service** > **Administration** > **Properties**
consumer_max_new_cases_daily	Maximum new cases that a consumer can create per day. • **Type**: integer • **Default value**: 10 • **Location**: **Customer Service** > **Administration** > **Properties**
consumer_max_comments_per_case_daily	Maximum comments that a consumer can post per day on a case. • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **Administration** > **Properties**
consumer_max_products	Maximum registered products per consumer.

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Consumer Service Portal properties (continued)

Property	Description
	• **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **Administration** > **Properties**
create_case.description.enable_html_editor	Enable the flag to add description using the HTML editor on the Create Case form page. • **Type**: boolean • **Default value**: True for new customers and False for upgrade customers. • **Location**: **Customer Service** > **Administration** > **Properties**

Related topics

Setup the Customer and Consumer Service Portals

Rate limit rule form for guest user access to catalog items

The REST API Rate Limit Rule form enables you to set the number of API requests in an hour by guest users.

REST API Rate Limit Rule form fields

Field	Description
REST API resource	Rest API resource. This field is auto-populated depending on the values entered in the other fields.
Name	Unique name for the rate limit rule.
REST API	REST API selected from the list of all external-facing REST APIs for the instance. Select **Service catalog**.
Version	Version of the REST API. Values listed depend on the REST API selected. Select **latest**.
Resource	Resource for the version. Values listed depend on the Version selected. For example, • Buy Item • Submit a Record Producer

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REST API Rate Limit Rule form fields (continued)

Field	Description
	• Validate Variable Regex (If the item consists of a variable which requires Regex Validation) • Checkout Order Guide • Variable display value • Check requested for delegation on item
Active	Check box to indicate that the rate limit rule is active. Rate limit rules are activated by default as soon as you create them. You can deactivate rate limit rules to stop enforcing a rate limit or activate rate limit rules to resume enforcing a rate limit.
Request limit per hour	Maximum number of requests permitted in an hour. **Note:** Whenever you update the value of this field, the ServiceNow AI Platform resets the count of requests to 0 and deletes all violations for the current hour.
Apply to	Users restricted by this rule: • **Single user** applies the rate limit to a specific user. • **Users with role** applies the rate limit to all users with a specific role. • **All users** applies the rate limit to all users. Select **Users with role**.
Role	Role to which the rate limit applies. Select **public**. **Note:** Appears only when you select **Users with role** at the **Apply to** field.

Related topics

Sitemap Generator for the Consumer Service Portal

The ServiceNow® Sitemap Generator application enables you to efficiently define and automatically generate XML sitemaps.

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Sitemap Generator configuration requirements for the Consumer Service Portal

The sitemap is generated from a script or static XML. Validating sitemaps isn't handled automatically, so verify when creating a sitemap that its contents meet the following requirements:

- Includes only the knowledge base and catalogs configured for the Consumer Service Portal
- Includes only Consumer Service Portal pages with unauthenticated user access
- Excludes Consumer Service Portal URLs that aren't publicly accessible
- Excludes pages that respond with a 301 redirect
- Excluded retired and expired knowledge base articles
- Includes hreflang support for knowledge articles

For information about sitemap requirements for search engine optimization (SEO), see Build and submit a sitemap in the Google documentation.

Usage calculation of self-service experiences

Calculates usage across self-service experiences, including Service Portals, Engagement Messenger, Community, and Web Embeddables. The dashboard displays the total of aggregated sessions across all self-service experiences.

Service portals, Engagement Messenger, and Community usage calculation

Service portals, Engagement Messenger, and Community are billed for the aggregate number of sessions in a month generated by unauthenticated-guest and authenticated-external users (internal users are excluded). Total sessions in a month is the sum of guest user sessions and external user sessions after deducting search engine bot sessions.

To view the Customer Portal Usage dashboard, navigate to **All** > **Customer Service** > **Administration** > **Portal Usage**.

Note: This definition tracks usage of self-service experiences based on the user roles and ignores usage of non CSM portals or roles. Sessions are tracked for the following roles:

- External roles: sn_esm_user, sn_customerservice.requester, sn_communities.community_user
- Internal roles: sn_customerservice.self_contributor
- Unauthenticated roles: Guest

A user session is a period of activity on the self-service experiences by any of the following session types:

- Guest session: Session where the user isn't logged in
- Bot session: Separate count of sessions generated due to bots and crawlers
- External session: Session where the user is an external user, typically a customer, or consumer who is logged in

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The aggregate session count is based on the following

calculations:

A user session times out after a specific period of inactivity.

User access to the self-service experiences is tracked as follows: per session, per day, and per experience. If the same user logs in from multiple browsers or devices, each login is counted as a separate session. Each first call of a page in an experience starts a session and, the usage metrics are calculated for the 24 hours window.

The default session timeout is 30 minutes. This setting can be adjusted using a system property. For more information about modifying the session timeout setting, see Manage user sessions.

Site session calculation examples

A user logs in, logs out, and then logs in again.

Example of a site session calculation for the following user journey

Step	User activity	Billable count incremented
1	User visits the experience as an anonymous or guest user	Yes
2	User logs in	No
3	User logs out	No
4	User logs in immediately after logging out	Yes

A user logs in and continues the session past midnight:

Example of a site session calculation for the following user journey when they continue the session past midnight

Step	User activity	Billable count incremented
1	User visits the experience as an anonymous or guest user	Yes
2	User logs in	No
3	User session continues past midnight	Yes
4	User logs out	No

Web Embeddables sessions usage calculation

Web Embeddables sessions are also billed for the aggregate number of sessions in a month generated by external users (users with sn_esm_user role or sn_customerservice.requestor) and unauthenticated guest or visitor users (snc_visitor role).

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To view the dashboard, navigate to **All** > **Customer Service** > **Administration** > **Portal Usage**.

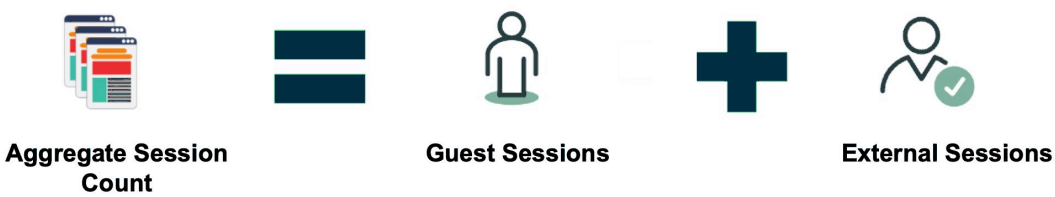
Note: This definition tracks usage of Web Embeddables based on the user roles and ignores usage of non CSM portals or roles. Sessions are tracked for the following roles:

- External roles: sn_esm_user, sn_customerservice.requester
- Unauthenticated roles: Guest and snc_visitor

A user session is a period of activity on Web Embeddables component on the third-party website by any Web Embeddables component. The following session types:

- Web Embeddables authenticated external session: Session where the user is logged in and role is sn_esm_user role or sn_customerservice.requestor accessing through an embeddable component.
- Web Embeddables guest session: Session where the user is not logged in or is OTP verified to access the submitted requests.

The aggregate session count is based on the following



calculations:

User access to the Web Embeddables component is tracked as follows: per session, per day, and per module. If the same user logs in from multiple browsers or devices, each login is counted as a separate session. Each first call of a Web Embeddables component starts a session, and the usage metrics are calculated for the 24 hours window.

The default session timeout is 30 minutes. This setting can be adjusted using a system property. For more information about modifying the session timeout setting, see Manage user sessions.

Site session calculation examples

A user logs in, logs out, and then logs in again.

Example of a site session calculation for the user journey below

Step	User activity	Billable count incremented
1	User visits the Web Embeddables as an anonymous or guest user	Yes
2	User logs in	Yes
3	User logs out	No
4	User logs in immediately after logging out	Yes

A user logs in and continues the session past midnight:

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Example of a site session calculation for the user journey below when they continue the session past midnight

Step	User activity	Billable count incremented
1	User visits the Web Embeddables as an anonymous or guest user	Yes
2	User logs in	Yes
3	User session continues past midnight	Yes
4	User logs out	No

Customer Service Cases list

The Cases list displays a list of customer service cases for the current user.

Users with the sn_customerservice_agent or sn_customerservice_manager roles can view the Cases list in the Customer Service Management application. The default view of the Cases list includes the following columns:

- **Number**
- **Short description**
- **Contact**
- **Account**
- **Channel**
- **State**
- **Priority**
- **Assigned to**
- **Updated**
- **Case Report** (add a column to access this table if needed)

External customers can view a list of cases from the customer portal. For external users with the sn_customerservice.customer or sn_customerservice.customer_admin roles, the Cases list displays a subset of case information, including:

- **Number**
- **Short description**
- **Product**
- **Priority**
- **State**
- **Updated**

For external users with the sn_customerservice.partner or sn_customerservice.partner_admin roles, the **Account** column is also displayed.

Cases displayed in the Case list by user role

The cases included in the Case list are determined by user role.

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Internal and External for the Case List

User Role	Cases Included in Case List
Internal roles	
sn_customerservice.customer_admin	All cases
sn_customerservice_manager	All cases
sn_customerservice_agent	All cases
External roles	
sn_customerservice.customer_admin	• Cases created for the customer administrator's account • Cases created by contacts who have a contact relationship with the customer administrator's account **Note:** A contact relationship enables a contact with the customer role or customer admin role to manage the account for which the contact relationship has been established.
sn_customerservice.customer	• Cases created by the customer • Cases created by an agent for the customer

sn_customerservice.partner_admin	• Cases created by the partner:
	  ○ For their own account
	  ○ For a customer account
	• Cases created for the partner administrator's account

sn_customerservice.partner	• Cases created by the partner • Cases created by an agent for the partner • Cases created for the same account • Cases created from a partner account

Engagement Messenger reference

Reference topics provide additional information about Engagement Messenger.

Greeting feature configuration

Understand the configuration of the Greeting feature in the Engagement Messenger to configure the field values.

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Greeting feature configuration form

Field	Description
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Unauthenticated user greeting	Text that is displayed in the header of the messenger home page to greet a guest user. For example, Hello!
Enable for authenticated users	Option for enabling this feature for users who sign in into the website that hosts the messenger.
Authenticated user greeting	Text that is displayed in the header of the messenger home page to greet a user who signs in into the website. This field is automatically set to **Hi, <user>!**, where <user> indicates the name of the user who has logged in. The other variables that you can use with <user> are the following: • <title> which indicates the salutation such as Mr., Ms., or Dr. as per the details in the Users [sys_user] table. • <part_of_day> which displays the greeting based on the part of the day of the user's region. For example, Good morning, Good afternoon, or Good evening.
Greeting message	Tagline for the user greeting on the header of the messenger home page. [[URL|Display Text]] indicates format to define URL and display text. For example, `[[https://www.example.com|Example]]`

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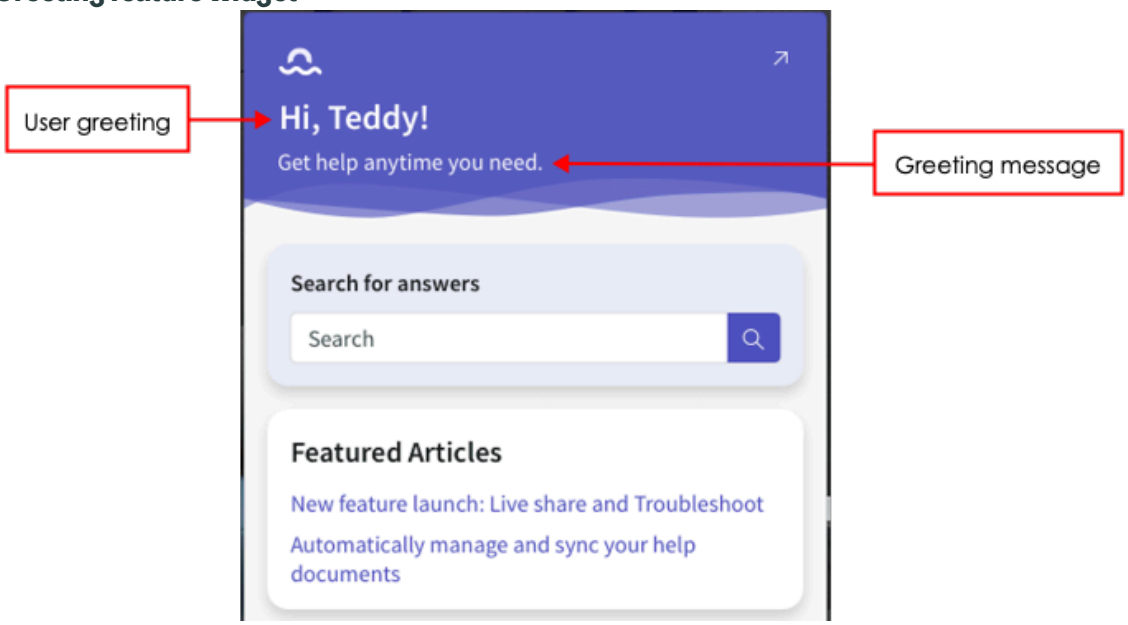
Greeting feature widget



Knowledge feature configuration

Understand the configuration and related lists of the Knowledge feature in Engagement Messenger to configure the field values.

Knowledge feature configuration form

Field	Description
Show articles by	Article category that is shown on the home page of the messenger. You can select one of the following categories: • Featured articles: Articles that are based on the keywords that are associated with the articles. For information on displaying articles in the Featured content section, see Add a knowledge article to featured content. • Most viewed articles: Articles that have the highest view among the articles of your knowledge base. The articles shown in the messenger are from the knowledge bases that you add in the **Knowledge bases** field.
Article count	Number of articles that are shown on the messenger home page. The articles are shown based on the option that you select in the **Show articles by** field.

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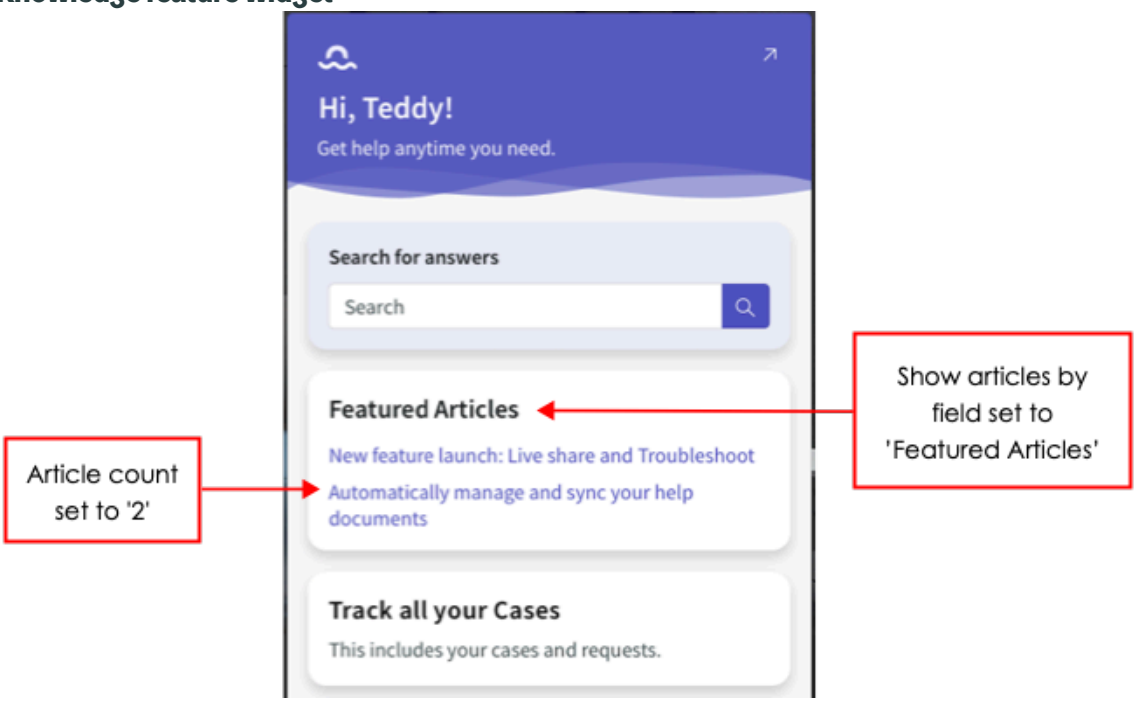
Knowledge feature configuration form (continued)

Field	Description
Knowledge Bases	List of knowledge bases that are associated with your messenger module. Use the Edit option ( ) and search to add a knowledge base to your messenger module.
Enable copy permalink	Option for enabling your customer to copy the permalink of a knowledge article.

Knowledge feature widget



Note the following points while you are configuring the Knowledge feature on your Engagement Messenger module:

- To add knowledge bases to your messenger module, verify that the knowledge_admin role is manually assigned to the user with Engagement Messenger admin [sn_csm_ec.ec_admin] role.
- If the knowledge base that you added to the Engagement Messenger has no articles, then the homepage of the messenger UI does not display any knowledge article widget even when you select a value for the **Show articles by** and **Article count** fields.

Note the following points regarding the live preview of Knowledge feature. However, the actual functionality of the feature is not affected when the Engagement Messenger is deployed in your website.

- The list of articles that is shown in the messenger live preview depends on the application access that the knowledge_admin has to the articles.

  If the knowledge_admin does not have access to any articles, then no content is displayed in the preview. In such a case, only a title **Featured articles** or **Most viewed articles** is displayed.

- Changing the value of the **Show articles by** field refreshes only the title and not the content in the messenger preview.

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Search feature configuration

Understand the configuration of the Search feature in Engagement Messenger to configure the field values.

Search feature configuration form

Field	Description
Search message	Text that is used for the search feature widget in the messenger.
Placeholder text	Placeholder text that appears in the search box.
Enabled for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger. **Note:** • You also must configure EC AI Homepage Search widget, Typeahead Search widget, and AI Search Assist widget for public access to enable AI search for unauthenticated users. For more information, see Enable AI Search in Engagement Messenger for unauthenticated users. • Starting with the Vancouver release, the chat client was enabled by default only for authenticated users. To enable the chat client for unauthenticated users to be able to access Virtual Agent chat and Live Agent chat, you must enable the *$sn-va-web-client-app* and *sn_va_web_client_app_embed* pages for public access. For more information, see Make UI pages public or private.
Enabled for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.
Search application	Application that is used to power the search functionality in Engagement Messenger. This field is automatically set to **Engagement Messenger AI Search Config**. To configure the new search application, navigate to **All** > **AI Search** > **Search Experience** > **Search Applications**.

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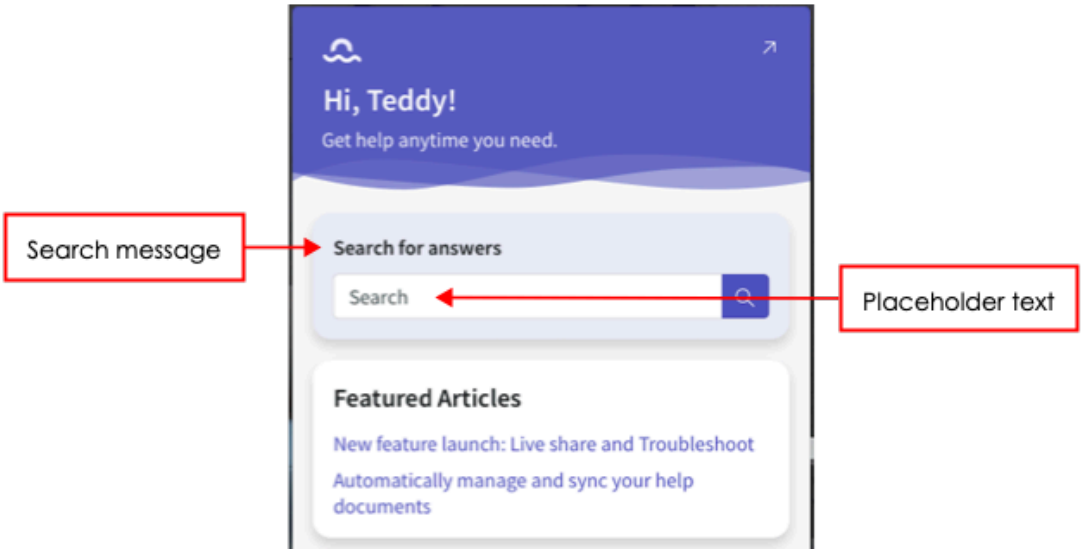
Search feature widget



In addition to configuring these fields for Engagement Messenger, you must configure AI Search in your ServiceNow instance and then enable Typeahead Search and AI Search Assist widgets so that the unauthenticated users can use the AI search feature from Engagement Messenger.

For more information on enabling Typeahead Search and AI Search Assist widgets for Engagement Messenger, see Enabling AI search in the Customer and Consumer Service Portals for unauthenticated users.

For more information of AI Search configuration, see Configuring AI Search.

For more information on the availability of AI Search in your instance, see the AI Search Availability [KB0867751] article.

Note:

- In the Firefox browser, AI Search results aren't displayed on the Engagement Messenger home page.
- If AI Search isn't enabled:
  - The search feature won't be available for users if the messenger module is created on or after version 5.6.
  - Zing search is used for messenger modules created before version 5.6.

Case management feature configuration

Understand the configuration of the Cases feature in Engagement Messenger to configure the field values.

Cases feature configuration form

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.
Feature launch message	Text for the Case form launcher widget in the messenger.

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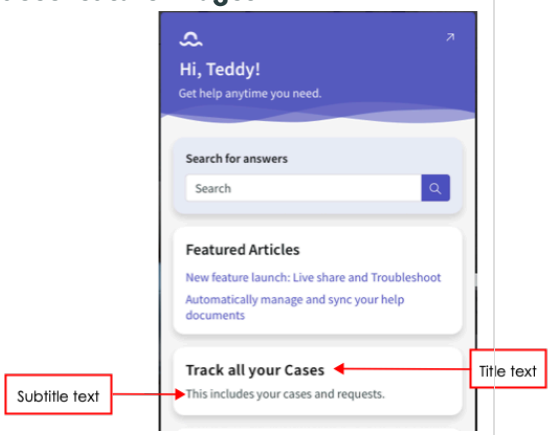
Cases feature configuration form (continued)

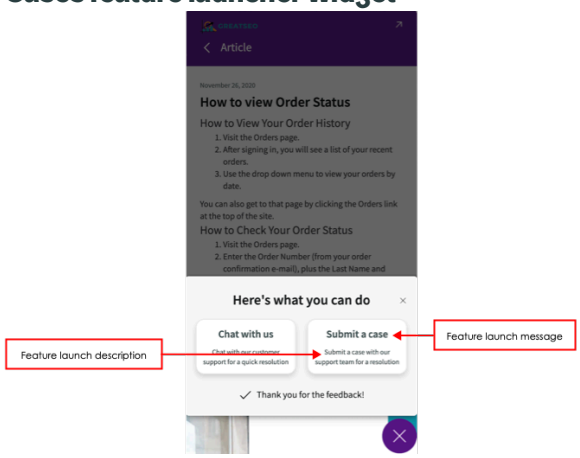
Field	Description
	For example, if a user provides feedback to a knowledge article that it wasn't helpful, the messenger displays a widget to create a case. Clicking this widget launches a case form for the user to fill and submit.
Feature launch description	Description for the Case form launcher widget in the messenger.

Note: The Case feature is not available for the guest users.

Cases feature widget



Cases feature launcher widget



Catalog feature configuration

Understand the configuration of the Catalog feature in Engagement Messenger to configure the field values.

Catalog feature configuration form

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.
Catalogs	List of catalogs that are associated with your messenger. Use the Edit option ( ) and search for a catalog to add to your messenger.

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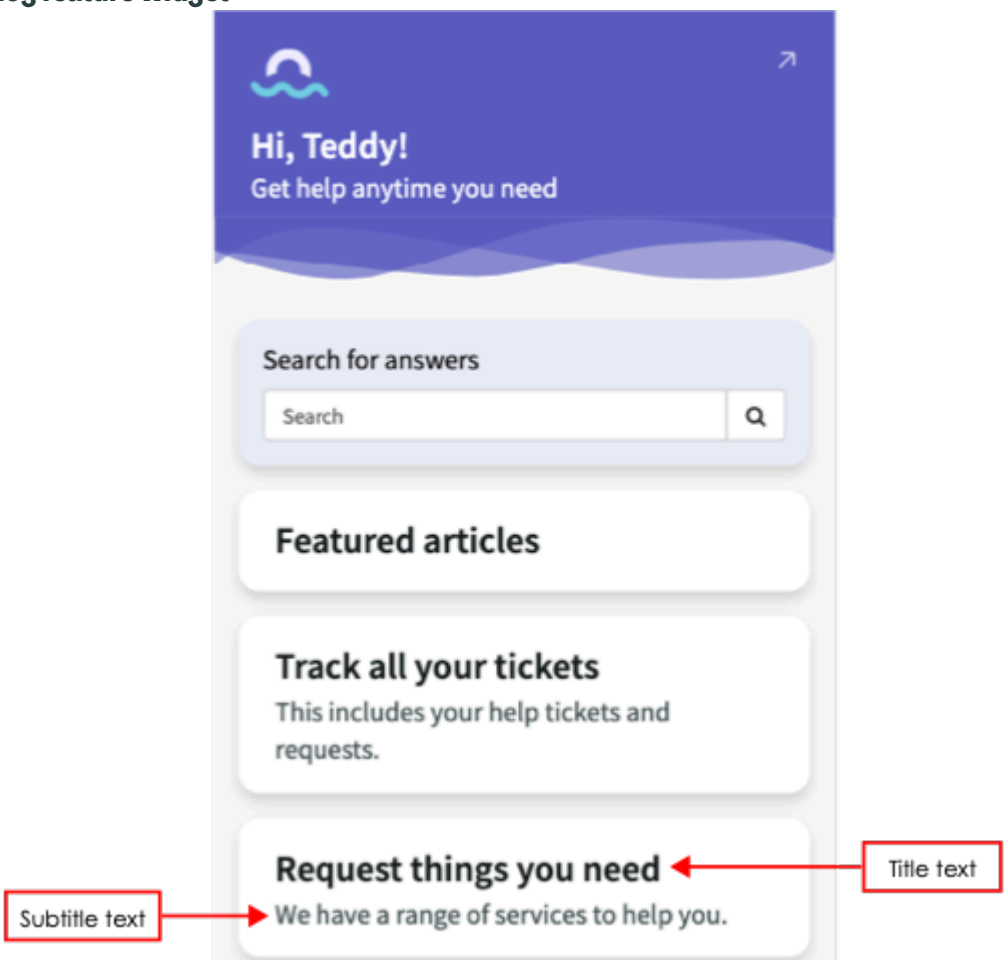
Catalog feature widget



Note: When you upgrade Engagement Messenger application from v1.0.0 to a newer version, the Catalog feature is disabled for all the existing messenger modules. However, AI search results from the home page of the Engagement Messenger still show catalogs to the users. For more information, see the Known issues in Engagement Messenger [KB0952509] article.

Field service feature configuration

Understand the configuration of the field service feature in Engagement Messenger module to configure the values.

To enable the field service feature, ensure that you activate the Field Service Management - Customer Experience plugin (com.snc.fsm_customer_experience) in your ServiceNow instance.

Once the plugin is active, navigate to the Features section of the guided configuration view of your Engagement Messenger module and enable the Field service feature.

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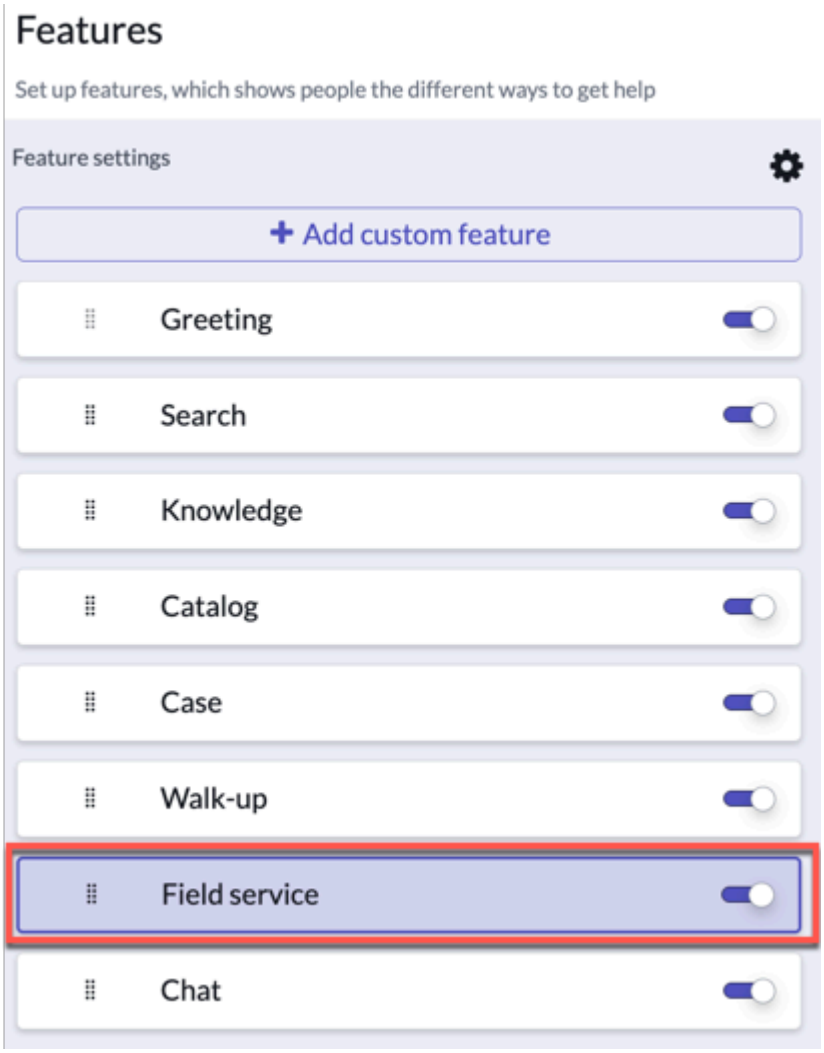
Field service features



Field service feature configuration fields

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.

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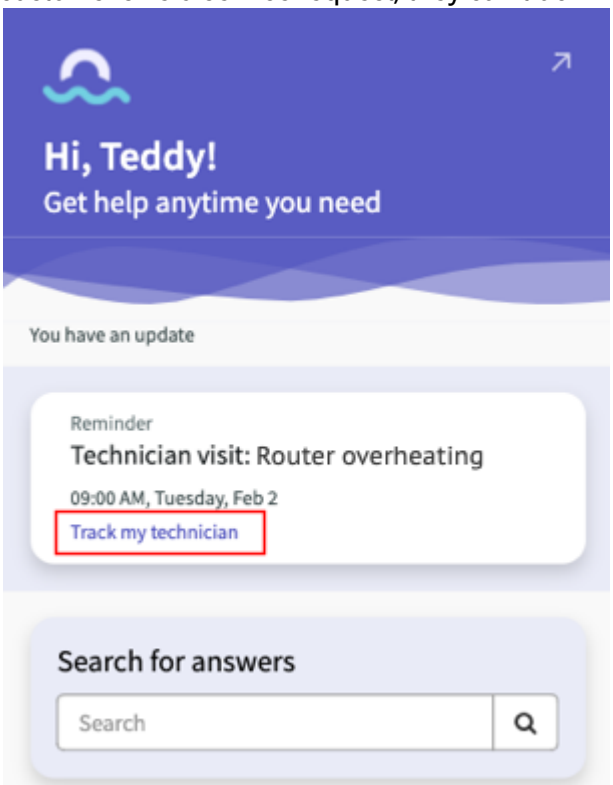
Enabling technician tracking from Engagement Messenger

When a technician is assigned to resolve your customer's field service request, they can track their technician from Engagement Messenger.



To enable this functionality, ensure that you meet the following criteria:

- Activate the Field Service Management - Customer Experience plugin (com.snc.fsm_customer_experience).
- in the sys_user table, enable the **Geolocation tracked** field for all your field service agents who would be assigned to the customer work orders.

  For more information, see Location tracking.

Walk-up feature configuration

Understand the configuration of the Walk-up feature in Engagement Messenger module to configure the field values.

To enable the walk-up feature for your customers, activate the following plugins in your ServiceNow instance:

- Walk-up for CSM plugin (com.snc.walkup_for_csm) for authenticated users
- Guest Walk-up Experience for Customer Service plugin (sn_guest_walkup_cs) for unauthenticated users

Once the plugin is active:

1. Navigate to the Features section of the guided configuration view of your Engagement Messenger module.
2. Enable the **Walk-up** feature.

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Walk-up feature configuration fields

Field	Description
Title text	Title for the feature widget in the messenger.
Subtitle text	Description for the feature widget in the messenger.
Enable for unauthenticated users	Option for enabling the walk-up feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling the walk-up feature for users who sign in into the website that hosts the messenger.

3. Select **Configure walk-up here** to configure details of your customer support centers. For more information, see Configure Walk-up Experience locations.

Chat feature configuration form fields

Description of the Chat feature configuration form fields.

Chat feature configuration form

Field	Description
Title text	Title for the chat feature widget on the messenger home page. The default title is `Chat with an agent.`
Reference chat topic	The topic that enables contextual chat for case or work order. This field is automatically set to **EC Contextual help**.
Message for when chat is offline	The message that appears on a messenger when an agent is offline and Virtual Agent isn't set up. The default message is `Our customer support is offline.`
Enabled for unauthenticated users	Option for enabling the Live and Virtual Agent chat feature for guest users who visit the website that hosts the messenger.

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Chat feature configuration form (continued)

Field	Description
	Note: Starting with the Vancouver release, the chat client was enabled by default only for authenticated users. To enable the chat client for unauthenticated users to be able to access Virtual Agent chat and Live Agent chat, you must enable the *$sn-va-web-client-app* and *sn_va_web_client_app_embed* pages for public access. For more information, see Make UI pages public or private.
Enabled for authenticated users	Option for enabling the Live and Virtual Agent chat feature for users who sign in to the website that hosts the messenger.
Feature launch messaging	
Feature launch message	Title of a chat card when it's initiated from a chat feature.
Feature launch description	Description of a chat launcher that is within a feature launch message.
Global chat settings	
Change the default mode for chatting	Determines the default mode for chatting, either synchronously (Chat) or asynchronously (Messaging). For information on how to set the default chat mode, see Change the default chat mode for the Chat feature.
Configure advanced chat options	Determines the chat options for managing various conversation features. For more information, see Chat Setup configuration form.
Email notifications for unread messages	Determines the email settings for sending email summaries for unread messages. For more information on how to enable email notifications for a specified duration, seeConfigure email notifications for unread chat messages.

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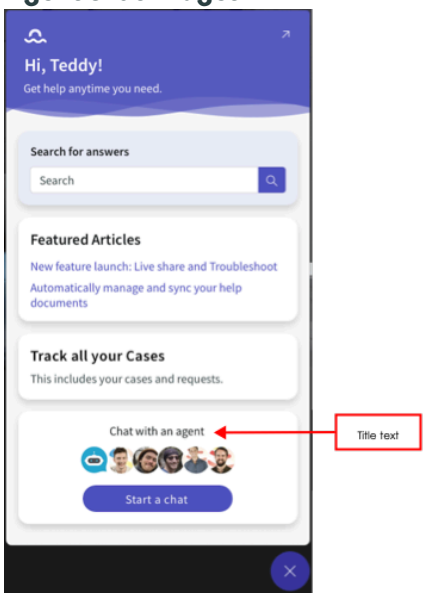
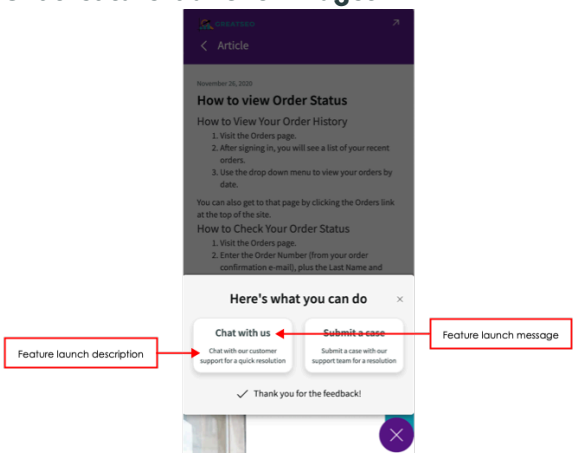
Chat feature configuration form (continued)

Field	Description
	Note: The green color next to **Status** indicates that the email notification is enabled.

Agent chat widget



Chat feature launcher widget



Callback feature configuration form

Description of the Callback feature configuration form fields.

- For more information about how to configure Omnichannel Callback for Customer Service Management (CSM), seeConfiguring Omnichannel Callback for Customer Service Management
- For more information about how to manage a callback from an agent using Engagement Messenger, see Working with callback requests using Engagement Messenger

Callback feature configuration form

Field	Description
Choose how to display the card	The type of display for the feature card on the messenger's home page. The available options are: • **Use an image in a card**: Shows a feature card as a clickable image. • **Use a title and subtitle in a card**: Shows a title and subtitle text as a display feature card

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Callback feature configuration form (continued)

Field	Description
Image	An image that appears as a feature card on the messenger's home page and has a portal or catalog link embedded in it. **Note:** This field appears only when **Use an image in a card** is selected from the **Choose how to display the card** field.
Use a title and subtitle in a card	• **Title text:** Title of the feature widget in the messenger. • **Subtitle text**: Description for the feature widget in the messenger. **Note:** This field appears only when **Use a title and subtitle in a card** is selected from the **Choose how to display the card** field.
Page type	The portal page that opens within the messenger when the user clicks on the feature card. By default *em_show_callback* is set to a portal page. For more information, see Requirements for embedding portal pages in Engagement Messenger.
Enable for authenticated users	Option for enabling the Callback feature for users who sign in to the website that hosts the messenger.

Configurable Cards feature configuration

The Configurable Cards feature enables you to add and customize the features in Engagement Messenger that aren't available by default.

Show a portal page or catalog item configuration form

Field	Description
Choose how to display the card	The type of display for the feature card on the messenger's home page. The available options are: • **Use an image in a card**: Shows a feature card as a clickable image. • **Use a title and subtitle in a card**: Shows a title and subtitle text as a display feature card
Image	An image that appears as a feature card on the messenger's home page and has a portal or catalog link embedded in it.

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Show a portal page or catalog item configuration form (continued)

Field	Description
	The requirements for using images are: • Supported formats are .jpg, .png, .bmp, and .gif. • Dimensions are a minimum of 120x370px and a maximum of 250x370px. **Note:** This field appears only when **Use an image in a card** is selected from the **Choose how to display the card** field.
Use a title and subtitle in a card	• **Title text:** Title of the feature widget in the messenger. • **Subtitle text**: Description for the feature widget in the messenger. **Note:** This field appears only when **Use a title and subtitle in a card** is selected from the **Choose how to display the card** field.
Page type	The type of page that opens when the feature card is clicked. • **Catalog Item**: The catalog item that opens within the messenger when the user clicks on the feature card. • **Portal Page**: The portal page that opens within the messenger when the user clicks on the feature card. You can configure additional parameters to load specific content from the portal page. For more information about embedding portal pages on Engagement Messenger, see Requirements for embedding portal pages in Engagement Messenger.
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.

Note: Engagement Messenger honors access permissions defined for the portal page or catalog item. If the users do not have access, the feature card will not appear on the messenger.

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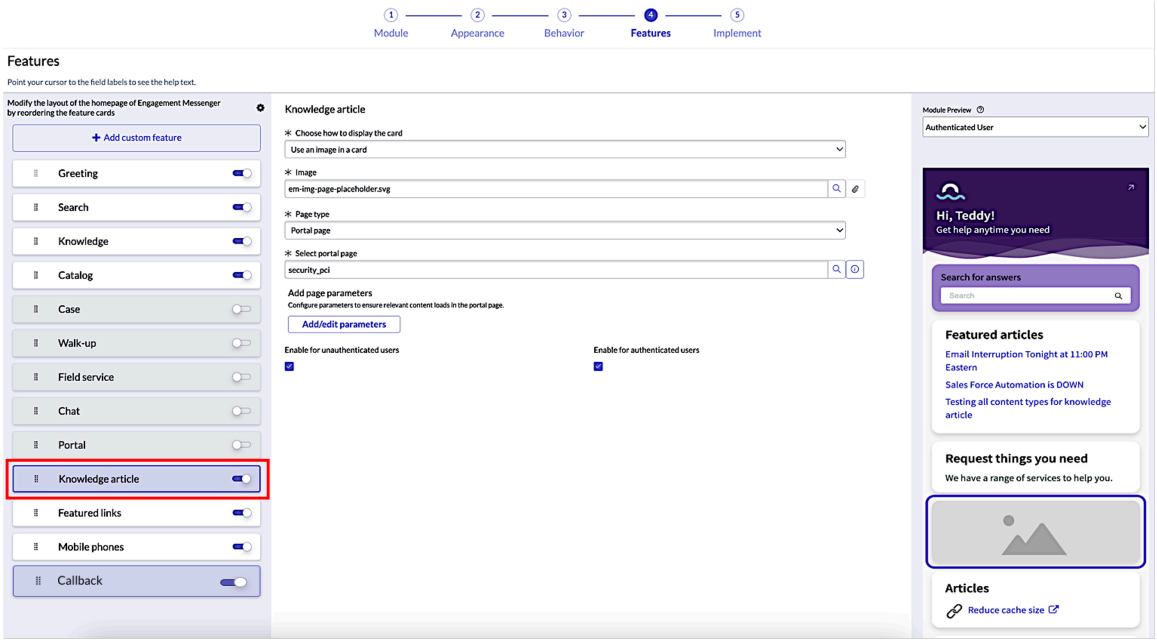
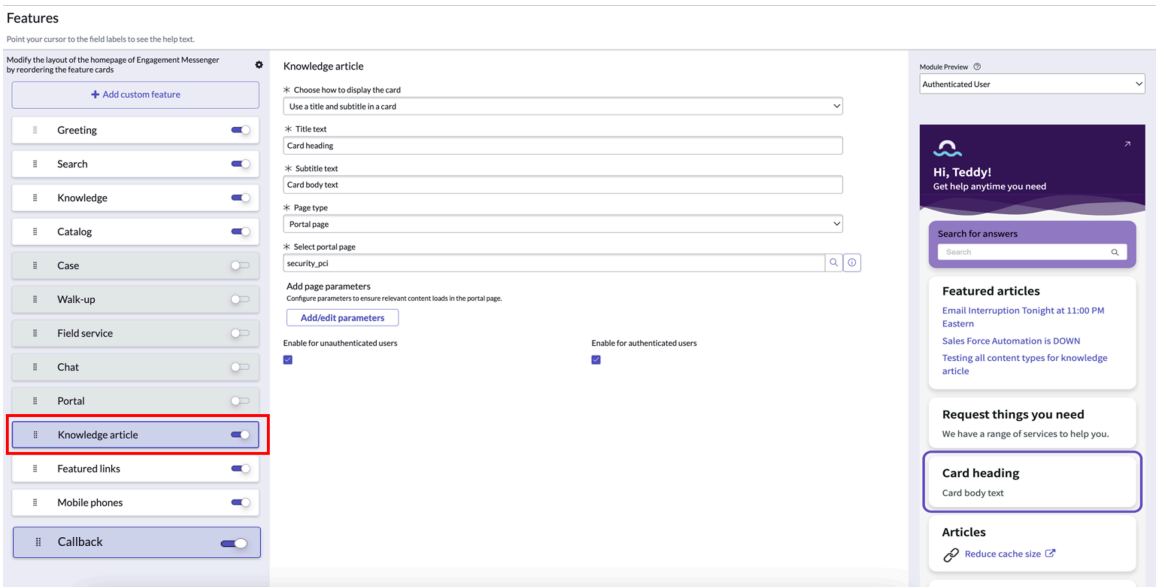
Use an image in a card



Use title and subtitle in a card



Show links to related websites configuration form

Field	Description
Title text	Title of the feature card in the messenger.
Show an image for each link	Option to display an image along with a link on the messenger's home page.
Add up to five links	Displays external website links on the messenger's home page. **Note:** You can add a maximum of five links.

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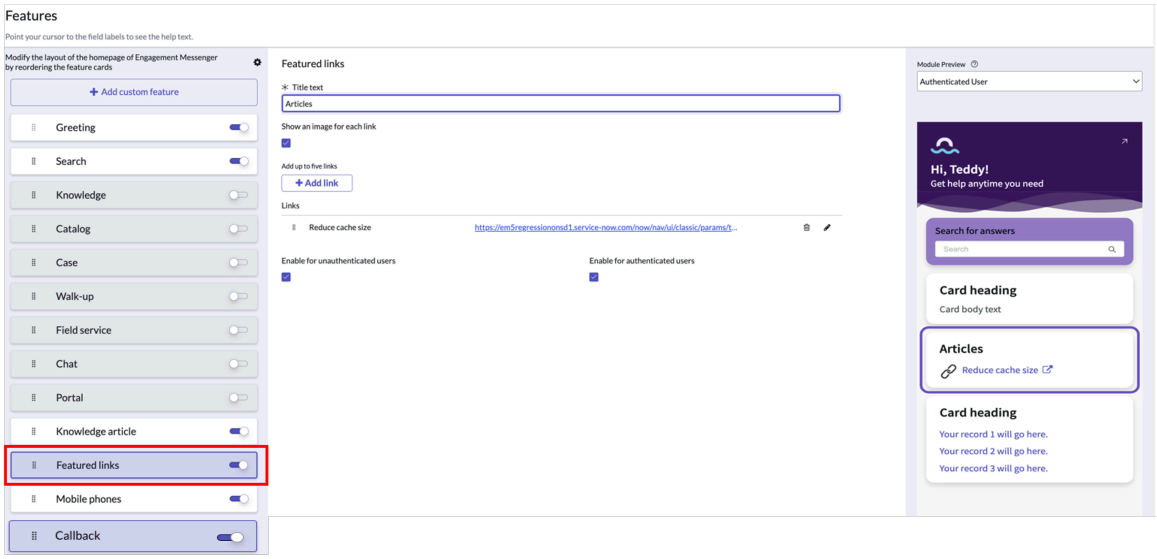
Show links to related websites configuration form (continued)

Field	Description
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.

Featured links



Show records from any table form fields

Field	Description
Choose a way to display records	Determines the appearance of records on the messenger. • **Each record displays as a link**: Shows a title and list of records from the selected table on the messenger's home page. It displays up to five records on the messenger home screen. • **Each record displays as a card**: Shows a feature card through which users can access data from the selected table.
Enable for unauthenticated users	Option for enabling this feature for guest users who visit the website that hosts the messenger.
Enable for authenticated users	Option for enabling this feature for users who sign in to the website that hosts the messenger.
Homepage	

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Show records from any table form fields (continued)

Field	Description
Title text	Title of the feature card displayed in the messenger.
Subtitle text	Description for the feature card displayed in the messenger.
Display of records	
Choose table	Determines the table that the card displays records from, either on your ServiceNow instance or from a remote third-party source.
Number of records to show	The total records to be shown as links on the messenger's home page. The maximum value is five. **Note:** This field is applicable only when **Each record displays as a link** is selected from the **Choose a way to display records** field.
Page title	Title of the messenger page that appears when a custom feature card is clicked. **Note:** This field is applicable only when **Each record displays as a card** is selected from the **Choose a way to display records** field.
Display field	The field from the selected table that you want to use as the primary display field.
Details field	The fields to display on the card that represent your data. You can select up to four detail fields. **Note:** Applicable only when **Each record displays as a card** is selected from the **Choose a way to display records** field.
Portal page to open	The portal page to display when the user selects any link or card.
Condition for records	Condition that restricts the records that appear in a list in the messenger.

Note: Engagement Messenger honors Access Control rules (ACLs) defined for any tables in your ServiceNow instance. If users don't have access, the feature card doesn't appear on the messenger.

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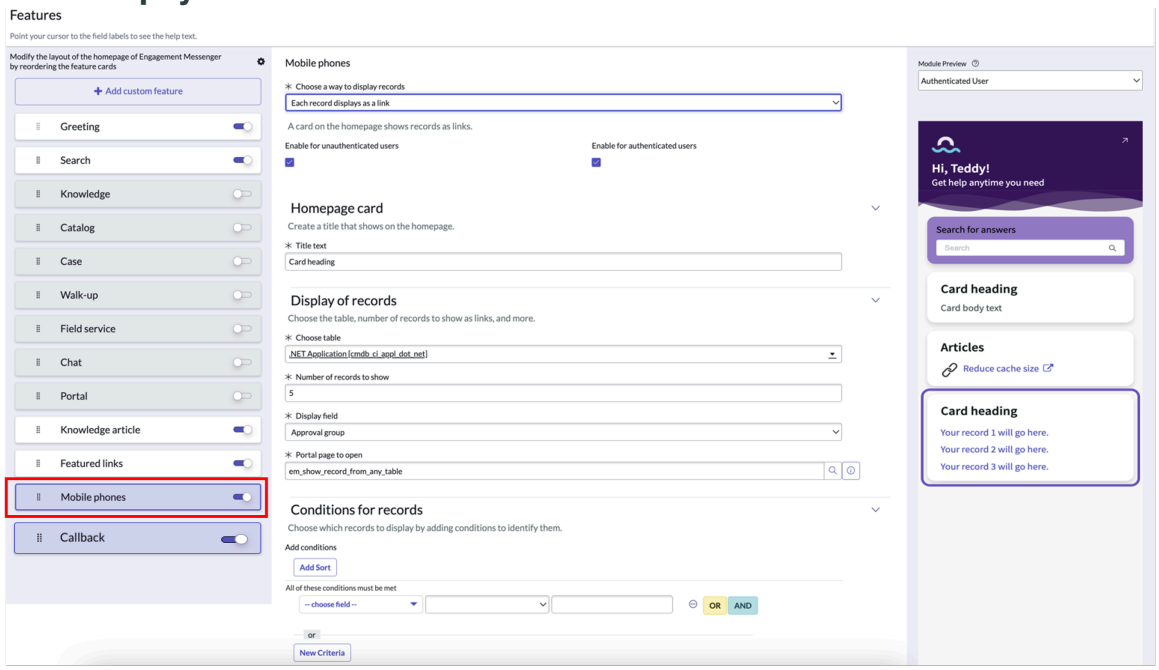
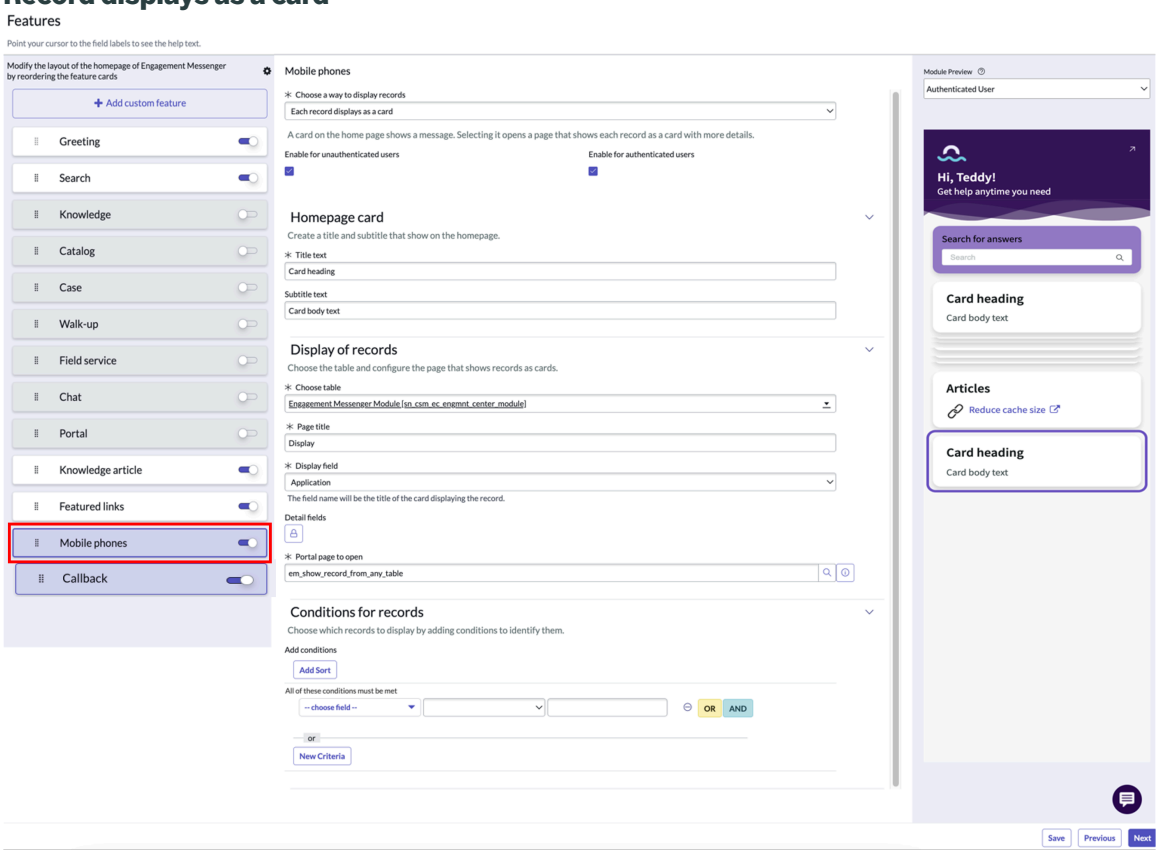
Record displays as a link



Record displays as a card



Chat Setup configuration form

Description of the Chat setup configuration form fields.

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Chat Setup configuration form

Field	Description
Name	Name of the Live Agent chat setup configuration. The default name is `Chat setup`.
Live chat enabled	Option to enable a live chat.
Allow transcript download	Option that enables to download a transcript of the conversation.
Show agent names and avatars	Option to display agent names and avatars in the Agent Chat client when a live agent enters, transfers, or exits a chat.
Enable notifications for all users	Option to enable the delivery of notifications.
Agent Whisper	Option to enable Agent Whisper, which enables agents to message supervisors without the requester knowing. For more information, see Agent Whisper.
Emoji Enabled	Option to enable the ability to include emojis in Agent Chat. For more information, see Using emojis in Agent Chat.
No Agent Available message	Message that appears when a live agent isn't available. The default message is `There are no agents available at the moment. Please try again later.`
Application	The application that contains this configuration record. This field is automatically set to Global.
Live chat wait status	Displays the wait time for Live Agent support in the Chat menu if **Wait Time** has been selected.

Configurable Portal widget library

The Configurable Portal widget library is a collection of prebuilt and reusable widgets that enables you to configure the portal homepage.

Configurable Portal widgets

Widget	Description
Portal Polaris Header widget	Display access key features and pages from any place in portal. It shows logo, search, profile, and others on level 1 of the header, and menu items on level 2 of the header. The appearance of menu items in level 2 of the header is determined by the Portal Mega Menu widget selected.
Portal Mega Menu widget	The menu on the header of the portal home page to navigate to different pages. It displays topics in a menu format organized hierarchically.

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Configurable Portal widgets (continued)

Widget	Description
Portal Browse Taxonomy widget	Display taxonomy topics along with the articles and catalog items related to them.
Portal Banner widget	Banner to display the announcements, new product or feature highlights, and important information on the top of the page.
Portal Banner Carousel widget	Displays multiple banners in a carousel to display information on multiple announcements, features, and products.
Portal Quick Links widget	Display different links for quick access including links to a knowledge article, a catalog item, a custom page, or an external URL. You can also select different layouts for quick links cards.
Portal Knowledge Quick Links widget	Display a list of articles for quick access. Articles can be selected based on featured articles, most viewed articles and more criteria or can be selected manually.
Portal Catalog Quick Links widget	Displays catalog items for important request items based on the criteria.
Portal Case Cards widget	Displays case records according to the filter criteria. You can display case details such as state, update, date, and more in a card format.
Portal Data List widget	Displays a list of cases, appointments, work orders, or other records from any ServiceNow table in list or card format.
Portal FAQ widget	Displays a list of frequently asked articles from a selected knowledge table that are categorized based on knowledge article category or related product.
Portal Polaris Footer widget	Display important information at the bottom of each page. The information includes company information and logo, site links, external links, and social media links.
Portal Object widget	Display key information of a record from the tables available on ServiceNow® table. Your users can also take related actions on the selected record.
Portal Taxonomy Topic widget	Displays topics as cards on your portal page enabling your users to access knowledge articles and catalog items related to a topic displayed on your portal in a Portal Browse Taxonomy widget.

Customer Service forms

Use forms to view and update Customer Service Management information.

Customer Service forms overview

Customer Service Management provides an intuitive platform for creating and managing forms that enables you to submit requests, track issues, or interact with the support team. These forms are customizable to meet the unique needs of your organization, that confirms every customer interaction is captured accurately.

With options for creating incident reports, service requests, or even feedback forms, you can enable your support agents to manage customer queries easily. By using dynamic form elements, workflows, and automatic data routing, customer service teams can streamline the

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support process, reduce response times, and improve customer satisfaction. Forms can be integrated into portals, emails, or other channels, giving customers multiple ways to reach out for help. Whether you're addressing a simple query or managing complex service requests, these forms help ensure that your support team is well equipped to deliver timely, effective service.

Account form

The Customer Service Management application uses the Account form to store customer account information.

For information about creating a customer account, see Configure accounts and contacts.

The Account form includes the following fields.

Account form fields

Field	Definition
Name	The name of the company.
Number	The automatically generated account number for this customer.
Primary Contact	The name of a user who is the main contact for this company.
Parent Account	The parent account for this account. Use this field to create an Account hierarchy.
Registration Code	A unique code for this account. The customer administrator can provide this code to customers for use when requesting a login on the customer portal. The registration code provides a method for validating the customer and the company before the login request is granted. Enter an alphanumeric code in this field or select the Generate Code icon to generate a unique code. For more information about generating unique account registration codes, see the Account Registration code generation in Customer Service [KB0753505] article in the HI Knowledge Base.
Customer	Denotes this account as a customer account. **Note:** If you're creating a customer account, this field is enabled by default.
Partner	Denotes this account as a partner account. A partner can report and manage cases on behalf of customers. A partner can also be a customer. **Note:** If you're creating a partner account, this field is enabled by default.
Website	The web address for the company.
Phone	The phone number for the company.
Street	The street address of the company.
City	The city in which the company is located.

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Account form fields (continued)

Field	Definition
State/Province	The state or province in which the company is located.
Zip/Postal code	The ZIP code or postal code for the company.
Country	The country in which the company is located.
Notes	Any additional information about the company.
Account Code	This field stores a unique value for each account. The value is determined by the last used value, which is stored in the `com.snc.cs_base.last.generated.code.tree.path` system property. For more information, see Properties installed with Customer Service Management. **Note:** If this property is reset to the value that's already being used, the system attempts to create accounts with account codes that are already in use, which can result in an invalid insert.
DUNS Number	DUNS stands for Data Universal Numbering System. It is a globally recognized unique identifier for businesses, widely adopted by governments and organizations around the world.
Active	This field indicates whether a customer account is active or inactive.

Details

Details fields

Field	Definition
Industry	The industry in which the company operates.
Legal entity name	The registered legal name of the company.
Business structure	The legal structure of the business, such as a corporation or a partnership.
Assumed name	The name under which the company does business when it differs from the legal entity name, also known as a "doing business as" (DBA) name.
Date of Incorporation	The date the company was incorporated.
Trademark	An image of the company's trademark. Select **Click to add** to upload an image.
Tax ID	The tax identification number for the company.

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Contact Information

Contact Information fields

Field	Definition
Email	The primary email address for the company.

Customer data model fields

Note: These fields were added to the Account table (`customer_account`) in the Brazil release. They appear on the Account form after an administrator adds them to the form view.

Customer data model fields

Field	Definition
Account stage	The stage of the account in the customer lifecycle. Available values are Suspect, Prospect, Customer, and Former customer.
Account status	The account's current operational status, such as Onboarding. The available statuses depend on the value selected in the **Account stage** field.
Customer since	The date the account became a customer.
Relationship tier	The tier that classifies the depth and value of the relationship with the customer. Available values are Standard, Preferred, Premium, Gold, Platinum, Elite, and Strategic.
Market segment	The segment that classifies the account by size and position in the market, based on characteristics such as employee count, company revenue, and industry.
Total ACV	The annual contract value (ACV) generated from the customer's agreement, shown as a currency amount.
External ID	The identifier for this account in an external system, such as a CRM, ERP, or identity provider. Use this field to correlate the account across systems. Values aren't required to be unique.

Related topics

Configure accounts and contacts

Create customer accounts

Consumer form

The Customer Service Management application uses the Consumer form to record information about an individual business-to-consumer (B2C) customer, including contact details, address, preferences, and portal sign-in.

The Consumer form includes the following fields.

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Consumer form fields

Field	Definition
Name	The full name of the consumer, assembled from the first, middle, and last name fields. This field is read-only.
Prefix	The title that precedes the consumer's name, such as Mr. or Ms.
First name	The first name of the consumer.
Middle name	The middle name of the consumer.
Last name	The last name of the consumer.
Suffix	The suffix that follows the consumer's name, such as Jr. or Sr.
Mobile phone	The mobile phone number of the consumer.
Business phone	The business phone number of the consumer.
Home phone	The home phone number of the consumer.
Fax	The fax number of the consumer.
Number	The identifier automatically generated for the consumer record.
Email	The email address of the consumer.
Gender	The gender of the consumer.
Photo	An image that represents the consumer. Select **Click to add** to upload a photo.
Active	Indicates whether the consumer record is active. Inactive consumers don't appear in lists.

Primary Address

Primary Address fields

Field	Definition
Street	The street address of the consumer.
City	The city of the consumer's address.
State / Province	The state or province of the consumer's address.
Zip / Postal code	The ZIP or postal code of the consumer's address.
Country	The country of the consumer's address.
Use same address for	The additional address types that reuse this address: Billing, Shipping, Mailing, and Cloud Operations. Select each type that applies.

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Preferences

Preferences fields

Field	Definition
Language	The preferred language for the consumer's communications and self-service experience.
Time zone	The time zone used to display dates and times for the consumer. The default is the system time zone.
Date format	The format used to display dates for the consumer.
Notification	Whether the consumer receives notifications. Select **Enable** to send notifications to the consumer.
Time format	The format used to display times for the consumer.

Login Details

Login Details fields

Field	Definition
User	The user record associated with the consumer for signing in to the self-service portal.
Active	Indicates whether the associated user account is active and can sign in.
Last login time	The date and time when the consumer last signed in. This field is read-only.
Failed login attempts	The number of consecutive failed sign-in attempts for the associated user account.

Notes

Notes fields

Field	Definition
Notes	Additional information about the consumer.

Customer data model fields

Note: These fields were added to the Consumer table (`csm_consumer`) in the Brazil release. They appear on the Consumer form after an administrator adds them to the form view.

Customer data model fields

Field	Definition
Consumer stage	The stage of the consumer in the customer lifecycle. The available values are configured for your instance.

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Customer data model fields (continued)

Field	Definition
Consumer status	The consumer's current operational status, such as Onboarding. The available statuses depend on the value selected in the **Consumer stage** field.
Relationship tier	The tier that reflects the consumer's overall value or engagement. The available values are configured for your instance.
Customer since	The date the consumer became a customer.
External ID	The identifier for this consumer in an external system, such as a CRM, ERP, or identity provider. Use this field to correlate the consumer across systems. Values aren't required to be unique.

Related topics

Configure consumers

Create consumers

Billing Account form

The Customer Service Management application uses the Billing Account form to define customer billing arrangements, payment responsibility, and billing schedules.

The Billing Account form includes the following fields.

Billing Account form fields

Field	Definition
Name	The name of the billing account.
Number	Internal unique number identifying the billing account.
Parent billing account	References the parent billing account.
Account	Customer account to which this billing account belongs. In the default view, this field appears when the billing account type is Customer account.
Contact	Customer contact to which this billing account belongs. In the default view, this field appears when the billing account type is Customer account.
Consumer	Consumer to which this billing account belongs. In the default view, this field appears when the billing account type is Consumer.
Paying party	The party responsible for paying the charges on this billing account.
Paying billing account	Billing account that pays the charges.

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Billing Account form fields (continued)

Field	Definition
	Note: This field is mandatory unless Paying party is None, and it isn't available when Paying party is None. When Paying party is Self, the field is set to the current billing account and is read-only. When Paying party is Parent or Designated, you select the account. Changing Paying party clears this field .
Description	Description of the billing account.
Billing account type	Organization or user type associated with this billing account. When you create a billing account from a customer record, this field is set automatically from the source customer: Customer account for an account, or Consumer for a consumer. You can change the value before you save the record.
Status	Indicates the current state of the billing account.
Start date	Date when the billing account is set to active.
End date	Date when the billing account is closed or terminated.
Currency	Currency used for transactions in this billing account.
Billing schedule	The schedule that determines the billing cycle for the billing account.
Active	Status of the configuration. By using this functionality, you can enable or disable this configuration.

Additional fields

Note: The following fields exist on the Billing Account table in the Billing Account Core application but aren't on the form by default. As an administrator, you can add them to the form view as needed.

Additional Billing Account fields

Field	Definition
Billing account code	A unique code for the billing account, generated automatically when the record is created.
External ID	The identifier for this billing account in an external system, such as a CRM, ERP, or identity provider. Use this field to correlate the billing account across systems. Values aren't required to be unique.
User	The user associated with the billing account.
Company	The company associated with the billing account.
Billing account path	The path that represents the billing account's position in the billing account hierarchy. This field is maintained by the system.

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Related topics

Billing accounts

Install billing account

Asset form

The Asset Management application uses the Asset form to store asset information.

Field	Description
Display name	Name of the asset as it appears in the record lists. This field is automatically set when you create an asset, based on the **Asset Tag** and **Model** fields.
Model category	Model grouping of the asset. Based on the model category you select, the asset is linked to a configuration item.
Model	Specific product model of the asset.
Configuration Item	CI is automatically created when you create an asset. The name that appears in this field is based on the **Serial number** and **Model** field values. Point to the reference icon to view the configuration item details inherited from the asset record.
Quantity	Number of items this asset represents. An asset always has a quantity of one unless one or more of these points are true. • If the asset is a consumable, the quantity is unrestricted because consumables are tracked in groups. • If the asset is pre-allocated, the quantity is unrestricted when the **Model category** and **Model** values are defined and **Substate** is set to **Pre-allocated**.
General All the fields aren't available for each type of asset.	
Asset tag	Alphanumeric information assigned by your organization to help track the asset.
State	Current state of the asset, such as **On order** or **In use**.
Assigned to	Person using or primarily responsible for this item. This field appears when the asset state is **In Use**.
Stockroom	Name of the stockroom. This field appears only when the state of the asset is **In stock** or **Build**.
Aisle	Aisle details of the asset within the stockroom. This field appears only when the state of the asset is **In stock** or **Build**. **Note:** This field would appear only when the Hardware Asset Management Professional plugin (com.sn_hamp) is installed.
Space	Space details of the asset within the aisle. This field appears only when the state of the asset is **In stock** or **Build**. **Note:** This field would appear only when the Hardware Asset Management Professional plugin (com.sn_hamp) is installed.

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Field	Description
Managed by	Person who maintains the asset. This field value can be different from the person in the **Owned by** field.
Owned by	Person who has financial ownership of the asset. This field value can be different from the person in the **Managed by** field.
Parent	Parent asset of the asset. For example, a monitor or peripheral can have a workstation as their parent asset. When a parent link is defined, the fields related to assignment and state of the child assets is set to read-only and are populated based on the parent assignment and state fields. For more information, see Bundled models.
Class	Asset group, for example, base, hardware, license, or consumable.
Comments	Information about the asset that would be helpful for others to know.
Serial number	Serial number of this asset.
Substate	Current substate of the asset. The available substate settings depend on the state selected. For example, the **Retired** state contains the **Substate** options **Disposed**, **Sold**, **Donated**, and **Vendor credit**.
Location	Current physical location of the asset. **Note:** You can set the location to a place, floor, building, or campus. When you set the location to any of the options except the campus, the Location hierarchy section is shown on the asset form. The location hierarchy shows the hierarchical relationship between the specified location and its parent locations. Also, when you set the Location field to a place and then set the *sn_itam_common.sn_enable_indoormap_for_assets* system parameter to **true** on your ServiceNow instance, a real-time location map of the asset is shown on the asset form. The Location map doesn't appear by default. To view the map, select the Location map ( ) icon on the contextual sidebar of the asset record. Location map doesn't appear for excluded assets. You can also track your asset location using the Asset Indoor map in the Asset estate view of the Hardware Asset Workspace. For more information, see Track asset location using indoor maps.
Department	Department to which the asset belongs.
Company	Company or organization to which this asset belongs.
Assigned	Date on which the asset was assigned to a user.
Installed	Date on which the asset was installed.
Location Hierarchy The Location Hierarchy section is available only for hardware, consumables,bundle, and pallet assets. This section appears only under the following conditions: • When the *sn_itam_common.sn_enable_indoormap_for_assets* system parameter is set to **true** on your ServiceNow instance • When you select any location except the campus	

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Field	Description
Floor	Floor where the place specified in the Location field is located. **Note:** This field appears only when you select a place in the Location field and is populated automatically based on the location.
Building/ Structure	Building to which the floor belongs. **Note:** This field appears only when you select a place or floor in the Location field and is populated automatically based on the location.
Campus	Campus where the building is located. **Note:** This field appears only when you select a place, floor, or building in the Location field and is populated automatically based on the location.
Financial The Financial section is available only for hardware, software entitlement, and facility assets.	
Request line	Requested item to which the asset is linked.
Invoice number	Invoice under which the asset was billed.
Cost	Price at which the asset was purchased.
Vendor	Vendor from which the asset was purchased. The assets that are automatically created from purchase orders in Procurement, the default value of the **Vendor** field is the vendor specified on the purchase order.
Opened	Date on which the requested item record was opened. The system automatically populates the field when a request line is specified.
GL account	General ledger account number with which the asset is associated.
Cost center	Group financially responsible for the asset.
Acquisition method	The way of acquiring the asset. Base system choices are **Purchase**, **Lease**, **Rental**, and **Loan**. The assets that are automatically created from purchase orders in Procurement, the default value is **Purchase**
Expenditure type	The type of expenditure. • **Capex**: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. • **Opex**: Operational expenditure is an on-going expenditure. For example, toners for the photocopier.
Disposal	
Disposal order number	A unique number assigned to the asset disposal order.

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Field	Description
	Note: This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal vendor	The vendor assigned to carry out the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Vendor disposal order ID	Order number assigned by the vendor to carry out the asset disposal order. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal date	The date when the asset disposal order process is completed. **Note:** This field appears only if you've installed Hardware Asset Management from ServiceNow Store.
Disposal reason	Text explaining why the asset is being retired.
Beneficiary	Organization that receives the asset when it's retired.
Resale price	Value of the asset when it's retired. For example, if the asset is donated, the value used when reporting taxes.
Scheduled retirement	Scheduled date on which the asset is retired.
Retired date	Actual date on which the asset was retired.
Depreciation The Depreciation section is available only for hardware and facility assets.	
Depreciation	Depreciation method that is applied. Base system choices are **Declining Balance** and **Straight Line**. The depreciation value is defaulted from the associated Model.
Depreciation effective date	Date on which the specified depreciation method begins.
Salvage value	Estimated value of an asset at the end of its useful life. This value must be less than or equal to the Cost of the asset.
Residual date	Number of days that have passed since the **Depreciation effective date**.
Residual value	Value in the Cost field with the depreciation method applied.
Depreciated amount	Amount the asset has depreciated.
Contracts	

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Field	Description
The Contract section is available only for hardware, software entitlement, or facility assets.	
Lease contract	Name of the lease contract that applies to the asset.
Warranty expiration	Expiration date of the asset warranty.
Lease expiration date	Date on which the contract gets expired. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Lease term (months)	The period in months the lease contract is active for. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Monthly lease payment	Amount that you pay monthly for the contract. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Support group	Group managing the contract covering the asset.
Like-kind exchange	A similar asset that you want to return to the contract vendor instead of the asset that you brought in lease. **Note:** This field would appear only when Hardware Asset Management (sn_hamp) is installed.
Supported by	Person managing the contract covering the asset.
Activities	
Work notes	Work notes are updated for the following cases: • Updates to **Assigned To**, **Managed To State**, **Substate**, and **Reserved** fields of asset. The columns for these fields are audited by default and any update is recorded in the work notes. • Work notes for hardware and software assets are updated when the asset is received by a purchase order and transfer order. These work notes help in tracking the life cycle of the asset.
Audit	
Audit number	Audit number of the asset.
Audit type	Type of audit that was carried out on the asset.
Last audit date	Date on which the last audit was done.

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Field	Description
Last audit state	State of the last audit.
Audited by	Person who performed the last audit.
Mobile The Mobile section is available only for the Mobile Device model category. **Note:** This section appears only when Hardware Asset Management (sn_hamp) is installed.	
Carrier	Name of the carrier company.
Ownership	Ownership of the asset. The available values are: • Employee • Corporate
IMEI	Unique number for tracking the mobile device.
Pre-enrollment ID	User who conducted the last audit.
MAC Address	MAC address of the mobile device.
Enrollment ID	User conducting the current audit.
Phone number	Phone number associated with the mobile device.
Enrollment name	Name of the mobile device enrollment.
Platform	Platform of the mobile device. The available options are: • Android • iOS • Windows • ChromeOS • Other
Enrollment state	Current enrollment state of the device. The available options are: • Enrolled • Unenrolled • Expired • Pending enrollment • Pending unenrollment
Purchased	Date on which the mobile device was purchased.

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Field	Description
Enrollment date	Initial enrollment date.
Upgrade eligible date	Date on which the mobile device is eligible for an upgrade.
Last enrolled	Date of last enrollment.
Service contract	Contract number associated with the mobile device.
Device activated	Activation status of the mobile device. The available options are: • Yes- The mobile device is activated. • No- The mobile device isn't activated.
Related links	
Calculate Depreciation	Select to calculate the depreciation amount and residual value.
Delete Assets Only	Select to delete the assets and not the associated CI.
Related lists	
Assets	Assets that 's related to the asset you created.
Expense lines	Expense line associated with the asset.
RMA	Return Merchandise Authorization associated with the asset.

Case form

The Case form displays detailed information about a customer issue or problem.

A customer service agent creates a case to identify a customer's question or issue and to track the activities related to resolving the issue. An agent also uses a case to track communication to and from the customer, including the communication channels being used.

Case activities include any action that is taken to resolve an issue. This can include phone calls or emails, knowledge base research, conversations with subject matter experts, and dispatch requests to field service agents, as well as other activities.

From the Case form, an agent can associate and store the related information, such as the customer's name, phone number, and company; account information; product and asset information; service contract and entitlement details, and any associated service level agreements (SLAs).

There are several key features to a case.

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- Communication between an agent and the customer or an agent and other employees within the organization. Details of all internal and external communication are recorded on the Case form.
- Any additional tasks that result from a case, such as a work order. Tasks are tracked from a related list on the Case form. These tasks may be internal to the organization or they may involve the customer.
- Information from the case that can be included in the knowledge base and used to help resolve other cases.

There are two different Case form views: a detailed view that is available to agents and agent managers in the Customer Service Management application and a simplified view that is available to external customers from the Customer and Consumer Service Portals.

Agent view

The agent view of the Case form includes the following components:

- A timeline that provides a visual display of case activities.
- Referenced entities for the case including account and contact information, product and asset information, service contract and service entitlement details, and any pertinent SLAs. Except for SLAs, this information exists in the system and can be associated with the case by the agent or agent manager.
- All communication about the case, both external and internal. This information is stored in the **Additional comments** field (external communication), the **Work notes** field (internal communication), the **Resolution notes** field. The **Resolution notes** field stores details about the case resolution, and the **Activity** field, which stores all communication in a chronological list.

Agents and managers can view a Case form by navigating to **Customer Support** > **Cases** and selecting one of the following menu options:

- **My Cases**
- **All**
- **Open**
- **Unassigned**

From the Case list, select a case number to display the Case form.

Customer Service Case form (agent view)

Field	Description
Number	Automatically assigned case number.
Channel	Method by which the customer initiated contact and the case was opened. • Web (default) • Phone • Email • Chat • Social

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Customer Service Case form (agent view) (continued)

Field	Description
Contact Local Time	Local time of the contact assigned to the case. This is automatically filled according to the time zone set on the Contact form. If no time zone is set on the Contact form, it is filled according to the **Contact Timezone** set on the case itself. If no time zone is set on the Contact form or in the Case form, the field is left blank and is read-only. If a case is closed or canceled, the **Contact Local Time** field is hidden. **Note:** Configure the form layout to add this field to the Case form.
Contact time zone	Contact time zone if the customer is working in a different time zone for the case. This field overrides the Contact form time zone. If no contact local time or contact time zone is set, the instance time zone is displayed. After the case is created, the field is read-only. **Note:** Configure the form layout to add this field to the Case form.
Account	Name of the contact's company. This field is filled in automatically if the information is available in the contact record.
Contact	Name of the customer contact for this case.
Consumer	Name of the consumer for this case.
Provider Organization	Organization resolving the cases.
Requestor Organization	Organization requesting the omni-channel interactions.
Product	Product model of the asset. A model is a specific version or configuration of an asset (for example, Apple Mac Book Pro). If you select an asset in the **Asset** field and the asset has an associated product, the **Product** field is automatically updated. A product can be associated with multiple assets.
Asset	Asset tag number or the serial number of the asset involved in this case.
Install base	The Install base field helps you track which products and services have been purchased by a customer, how they have been installed or provisioned, along with the detailed configuration for each installed item.
Partner Contact	Name of the partner contact for this case.
Follow the sun	Option to indicate that a case should be handed-off for global follow-up.

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Customer Service Case form (agent view) (continued)

Field	Description
	If a customer enters additional comments on a **Priority 1 - Critical** or a**Priority 2 - High** case, or if the case is escalated, the flag is automatically selected. The activity stream on the case form is updated with any changes. **Note:** Enable the **Follow the sun** check box on the Customer Service case form by setting the value of the property *sn_customerservice.FTS_flag_enabled* to **true**. Configure the form layout to add this field to the Case form.
Short description	Brief description of the issue or problem.
Opened	Date and time that the case was opened.
Priority	The assigned priority: • 1 — Critical • 2 — High • 3 — Moderate • 4 — Low (default)
State	Customer service case states: • New • Open • Awaiting Info • Resolved • Closed • Canceled **Note:** Configure the form layout to add this field to the Case form
Assignment group	Assigned customer service agent group.
Assigned to	Assigned agent. If a group is selected in the **Assignment group** field, the assigned agent must belong to this group.
Assigned on	Date and time when the case is assigned. This field is updated when a user is added or changed in the **Assigned to** field.
Contract	Contract number associated with this case.
Entitlement	Entitlement associated with this case. The entitlements available for selection in the reference list channel matches the case creation channel. The available entitlements are filtered by the settings in the **Account**, **Consumer**, and **Contract** fields.

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Customer Service Case form (agent view) (continued)

Field	Description
	If only one entitlement is available for this case, it is automatically added to the **Entitlement** field. Starting with the Zurich release, agents can add multiple entitlements to a case. If the *sn_customerservice.advanced_entitlements* system property is set to true, the Case Entitlements related list is visible on the Case form and the **Entitlement** field is hidden. For more information, see the following topics: • Add an entitlement to a case • Properties installed with Customer Service Management
Partner	Name of the partner company.
Notes	
Watch list	Users who receive notifications about this case when additional comments are added or if the state of a case is changed to **Resolved** or **Closed**. Select the add me icon to add yourself to the watch list.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list. Select the add me icon to add yourself to the work notes list. To enable notifications for users in the **Work notes list** field: **1.** Navigate to the Notifications (sys_notification) table. **2.** Select Case Action Status. **3.** In the **Who will receive** tab, do one of the following: ○ Add a user in the **Users** field. ○ In the **Recipients listed in fields** field, add the **Work notes list** field. **4.** Select **Update**.
Contributor Users	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user is added to the **Contributor Users** field. If this user is removed from the **Assigned to** field on the Case Task form, and they are not assigned to any other tasks for the case, thenn they are also removed from the **Contributor Users** field.
Contributor Groups	When a user with the case task agent role (sn_customerservice.case_task_agent) is assigned to a case task, the user's assignment group is added to the **Contributor Groups** field. If this user is removed from the **Assigned to** field on the Case Task form, and no other member of their assignment group is assigned to any other tasks for the case, then the assignment group is removed from the **Contributor Groups** field. If a group is removed from the **Assignment group** field on the Case Task form, and the group is not assigned to any other tasks for the case, then the assignment group is removed from the **Contributor Groups** field.

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Customer Service Case form (agent view) (continued)

Field	Description
Additional comments	Customer-viewable comments. Each comment is inserted into the **Activity** field when the user selects the **Post** button.
Work notes	Information about how to resolve the case, or steps taken to resolve it, if applicable. Internal users who have been added to the Work notes list receive the Case work notes added notification containing the work notes when added. You can configure the notification, as required. The notes are viewable by the admin, agent, and agent manager.
Activities	Records all activity associated with this case.
Resolution Information	
Resolved by	Agent to whom the case is assigned when the case is resolved.
Closed by	Name of the user who closed the case.
Resolution Code	Choice list indicating the resolution states for the case. This field is mandatory when an agent proposes a solution for a case.
Cause	Details about the cause of the resolution.
Resolution notes	Details about how the case was closed. This field is mandatory if a customer service agent or agent manager closes a case. If a customer closes a case, it is not mandatory.
Add resolution notes to comments	Option to determine if the resolution notes are added to customer-viewable comments when the case is resolved. If selected, the resolution notes are added to the **Additional comments** (customer-visible) field.
Resolved	Date and time that the case was resolved.
Closed	Date and time that the case was closed.

Customer view

Customers can view a Case form by selecting **My Cases** on the customer portal and then selecting a case number from their Case list.

The customer view of the Case form includes the following components:

- A process flow formatter that indicates the current state of the case.
- The related entity information, including account and contact information, product and asset information, and service contract information.
- An **Activity** field that stores all communication for the case in a chronological list.

Case process flow formatter

The process flow formatter provides a graphical summary of the stages of a customer service case.

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The process flow formatter is available in the platform interface when you select the Customer Self Service view.

Process flow formatter

The process flow formatter appears at the top of the Case form. It highlights the current state of the case and checks off the states through which the case has passed.

By default, the process flow formatter displays the following states:

- New
- Open
- Resolved
- Closed

Related topics

Process flow formatter

Case form related lists

The Case form includes related lists that store case information and that agents can use to perform case-related tasks.

Customer service case form related lists

Related List	Description
SLAs	The service level agreements that are associated with this case.
Tasks	Tasks that have been created for this case by the customer service agent or agent manager. When you create a task or change the state of a task, the information is recorded in the case **Activity** field. When you create a case task, the system generates a task number with a prefix. Following upgrade to the New York release: • New case tasks use the CSTASK prefix. • Existing tasks, regardless of state, use the TASK prefix.
Phone	The case phone log. A list of incoming or outgoing phone calls associated with this case.
Appointments	Appointments that the customer service agent makes with the customer or others as part of resolving this case. When you create an appointment, an appointment creation message is recorded in the case **Activity** field. The user selected in the **To** field on the appointment form receives an email with the appointment details.
Emails	The case email log. A list of the emails that are sent or received as part of resolving this case. The customer service agent or agent manager can send email from within the case, such as updates and inquiries to customers or other employees. A

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Customer service case form related lists (continued)

Related List	Description
	change in the state of the case triggers an automatic email to be sent to the customer. Customer contacts can create and update cases by email as well as receive updates from customer service agents.
Problems	A list of problems related to this case.
Work Orders	A list of work orders created for this case.
Social Logs	A list of the communication with customers or consumers that takes place through social media channels. The Social Log form includes the **Social Profile** of the user that created the communication and the **Social URL** for the conversation. Click the URL to open the conversation in a new tab.
Attached Knowledge	Knowledge articles attached as a proposed solution to the case.
Knowledge Gaps	Feedback tasks that are created when a knowledge gap is reported.
Escalations	A list of escalation records that are related to this case.
Child Cases	A list of child cases associated with this case
Requests	A list of requests associated with this case.
Blocked by	A list of blocking tasks that have been created for this case.
Related Parties	A list of related parties, such as contacts or consumers added to the case.

Case states

A customer service case can be in one of several states as the agent gathers information and works toward a resolution.

Customer service case states

Term	Definition
New	The initial state for a new case, which is created through any one of the channels: customer portal, email, chat, telephone, or from the Customer Service application. Actions the agent can take: • **Assign to me**: The case is assigned to the agent and the state changes to **Open**. • **Accept**: If assigned by the customer service manager, the agent accepts the case and the state changes to **Open**. • **Update**: updates the case. • **Close Case**: Closes the case. • **Delete**: Deletes the case. Actions the customer can take:

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Customer service case states (continued)

Term	Definition
	• **Update**: updates the case. • **Close Case**: Closes the case
Open	The case is assigned to an agent and the agent clicks **Accept** or an agent opens a case and clicks **Assign to me**. Both of these actions change the state from **New** to **Open**. Actions the agent can take: • **Update**: Updates the case. • **Request Info**: The agent requests additional information from the customer. The state changes to **Awaiting Info**. • **Propose Solution**: The agent proposes a solution for the case. **Note:** The **Resolution Code** and **Resolution notes** must be entered in the **Resolution Information** tab. The state changes to **Resolved**. • **Close Case**: Closes the case. • **Delete**: Deletes the case.
Awaiting Info	An agent clicks **Request Info**, changing the state from **Open** to **Awaiting Info**. Actions the agent can take: • **Open Case**: Changes the state back to **Open**. • **Update**: Updates the case • **Close Case**: Closes the case. • **Delete**: Deletes the case. Actions the customer can take: • **Update**: Once the customer updates the case, the state changes to **Open**. • **Close Case**: Closes the case.
Resolved	An agent provides a resolution code and enters resolution notes in the**Resolution Information** tab and clicks **Propose Solution**, changing the state from **Awaiting Info** to **Resolved**. The **Resolution code** and **Resolution notes** fields are mandatory when an agent proposes a solution for the case. Actions the agent can take: **Update** (Updates the case) Actions the customer can take: • **Accept Solution**: The customer accepts the solution proposed by the agent. The state changes to **Closed** and a survey is displayed. • **Reject Solution**: The customer rejects the solution proposed by the agent and the state changes to **Open**.

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Customer service case states (continued)

Term	Definition
	• **Delete**: Deletes the case. • **Close Case**: Closes the case.
Closed	After proposing a solution, an agent waits for the customer to respond. • If the customer clicks **Accept Solution**, the state changes from **Resolved** to **Closed**. • If the customer clicks **Reject Solution**, the state changes from **Resolved** to **Open**. An agent, agent manager, or a customer can close a case at any time, except when it is in the **Resolved** state. When it is in the **Resolved** state, only a customer can accept or reject the proposed solution. When an agent or agent manager closes a case, details must be included in the **Resolution notes**. This is not required when a customer closes a case. A case cannot be updated once it is closed.

Related topics

State flows

Create a case for install base items

Create a case for a new install base item by using the case form in the CSM Agent Workspace.

Before you begin

Role required: sn_customerservice_agent or sn_customerservice.consumer_agent

Procedure

1. Navigate to **All** > **Workspaces** > **CSM/FSM Configurable Workspace**.
2. In the list view, navigate to **Cases** > **My Cases**.
3. Select **New**.
4. Perform one of the following actions before selecting an install base item on the Create Case form.
   For a description of the field values, see Case task form.

Field	Action
Account	Select an account that has to be associated with the install base.
Consumer	Select a consumer that has to be associated with the install base.
Install base	Select an install base item to automatically fill in the relevant details from the install base form.

5. Next to the **Install Base** field, select the search icon , and then select the install bases from the pop-up window.

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The pop-up window displays only the list of install base items that are related to the selected account or consumer.

6. In the **Short Description** field, enter a description of the install base item.
7. Save the form.
   A new case with the install base item details appears in the My cases list.

Migrating the install base information for existing cases

Your customer service agents can use the case form on the CSM Agent Workspace to add an install base item to an existing case.

To populate existing cases with the install base information, agents can use the following sample script:

```
var installBaseMigrationUtil = new
 sn_install_base.InstallBaseMigrationUtils();
installBaseMigrationUtil.populateInstallBaseOnCases();
```

The migration script populates cases with the install base information, only if the case is associated with the install base item. To associate a case to an install base item, see Associate multiple install base items to a case.

Assign a partner contact on the case form

Enable Customer Service Management agents to assign partner contacts for an account that is associated to an install base item on the case form. By adding partner contacts, you can provide access to multiple partners to access their accounts.

Before you begin

Role required: customer service agent

Procedure

1. Navigate to **CSM/FSM Configurable Workspace** > **Cases** > **My Cases**.
2. Select **New**.
3. In the **Install Base** field, use the search icon to add an install base item on the Create Case form.
   The **Account** and **Contact** fields are automatically filled from the install base form. For a description of the field values, see Case task form.
4. In the **Partner** field, use the search icon to search for a partner associated with the selected account.
   The partner in the **Partner** field is the partner account that is associated with the account.
5. In the **Partner Contact** field, enter an eligible partner contact who has the following criteria:
   - All partner contacts of the partner account are eligible if the **Restrict Account Access** isn't enabled.
   - All partner contacts with the partner admin role are eligible if **Restrict Account Access** is enabled.
   - Partner contacts that are added as an Authorized Representative through the related party list for the install base item.
   - Partner contacts that are added as an Authorized Account through the related party list for the install base item.

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To add a related party to an install base item, see Add related parties to an install base item.

6. Select **Submit**.

Result

A partner contact is assigned to the case.

Case line item form

The case line item form displays details about a case line item on a case record.

Agents can use the case line item form to create a new case line item record and to view and edit an existing case line item record. When editing, agents can:

- Change the reason code
- Change the Priority, Assigned to, and Contact

To access a case line item record, navigate to **All** > **Customer Service** > **Cases** > **All Line Items** and select a record. Users with the following roles can access this list: system administrator, customer service agent, and customer service manager.

The case line item form includes the following related lists:

- Case Line Tasks
- Case Line Characteristics

Case line item form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Case Line table is **CSL**.
Parent case	The parent case for the case line item record. This field is mandatory.
Parent case line	The parent case line for the case line item record. This field supports the case lines hierarchy.
Top case line	The top case line for the case line item record. This field supports the case lines hierarchy.
Account	The name of the company that the case is opened for.
Contact	The name of the customer contact for the case.
Product offering	This field is a reference to the Product Offering table [sn_prd_pm_product_offering].
Product specification	This field is a reference to the Product Specification table [sn_prd_pm_product_specification].
Product model	This field is a reference to the Product Model table [cmdb_model].
Short description	A brief description of the case line item record.
State	A case line item record can be in any of the following states:

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Case line item form fields (continued)

Field	Description
	• Draft • New • Work in Progress • Awaiting Info • Resolved - Accepted • Resolved - Denied • Canceled If all of the case line items on a record are in one of the following terminal states, the system syncs the record state to the case line item state: • Resolved - Accepted • Resolved - Denied • Canceled Actions such as **Submit Case** and **Assign to me** change the state of the case and the case lines.
Priority	The priority of the case line record: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low • 5 - Planning
Assigned to	The agent assigned to the case line item record.
Request reason code	The reason for the requested change. Can be different for each case line item. • Increase Demand • Change in Contract • Initial input incorrect • None
Sold product	This field is a reference to the Sold Product table [sn_install_base_sold_product].
Install base	This field is a reference to the Install Base Item table [sn_install_base_item]. If the **Account** field is populated, this field displays the install base items for the selected account.
Asset	This field is a reference to the Asset table [asset].

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Case line item form fields (continued)

Field	Description
	If the **Account** field is populated, this field displays the assets for the selected account. If the **Product model** field is populated, this field displays the assets associated to the selected product model. If both the **Account** and **Product model** fields are populated, this field displays the assets associated with selected account and product model.
Resolution code	A code that indicates the resolution state of the case line item record. • Change approved • Added replacement product
Resolution Notes	The agent can use this field to specify how they reached the decision to either accept or deny a change to a case line item.
Contributor Users	This field is populated when a case line task is assigned to a case task agent.
Contributor Groups	This field is populated when a case line task is assigned to a case task agent.
Work notes	Enables users to post work notes to the record.

Case line task form

The case line task form displays details about a case line task associated with a case line item on a case record.

Case line task form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Case Line Task table is CSLTASK.
Parent case	The parent case of the case line item.
Account	The name of the company that the parent case is opened for.
Contact	The name of the customer contact for the parent case.
Case line	The number of the case line item that the task is created for.
State	The state of the case line task:

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Case line task form fields (continued)

Field	Description
	• Open • Closed
Priority	The priority of the case line task: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low
Assignment group	The assigned customer service agent group.
Assigned to	The agent assigned to the case line task.
Subject	The subject of the case line task.
Description	A longer, more detailed description of the case line task.
Work notes list	A list of users who are interested in the case task. These users receive a notification when work notes are added to the case task.
Work notes	Information about the case task and the steps taken to resolve it. Work notes are posted to the activity stream and are visible only to internal users.
Additional comments	Customer-viewable comments and information about the case task. Additional comments are posted to the activity stream.

Case line characteristic form

The case line characteristic form displays details about the product offering included in a case line item.

Case line characteristic form fields

Field	Description
Number	The automatically generated record number. The prefix for numbers from the Case Line Characteristics table is **CSLC**.
Case line	The case line item that this characteristic belongs to. This field is a reference to the Case Line table.
Characteristic	This field is a reference to the Characteristic table [sn_prd_pm_characteristic].
Characteristic option	This field is a reference to the Characteristic Option table [sn_prd_pm_characteristic_option].
Characteristic value	The value of a characteristic.

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Case line entitlement form

The case line entitlement form displays information about an entitlement associated with a case line item.

Case line entitlement form fields

Field	Description
Case line	The case line that the entitlement is associated with.
Entitlement	The selected entitlement.
Domain	The domain that the entitlement belongs to.

Case Report form

The Case Report form includes reporting-related fields that are derived from case records.

The Case Report table (sn_customerservice_case_report) extends from the Customer Service Case table (sn_customerservice_case). This table stores KPIs and metrics for case records and includes the following calculated metrics which are displayed on the Customer Service Manager dashboard.

- Agent Reassignment Count
- First Contact Resolution
- Reopen Count

The Customer Service Manager dashboard includes the **First Call Resolution** indicator, which shows the percentage of cases that were resolved during the first contact with the customer. The percent change in the current period appears under the total percentage. The value for the First Call Resolution indicator is returned by the *`CaseReportUtils`* script include.

Customer Service Case Report form fields

Field	Definition
Number	The automatically generated case report number.
First Contact Resolution	Records whether a case was resolved during a customer's first contact with an agent. This field can have one of the following values: • 0: None (default value) • 1: True • 2: False For more information about how this field is calculated, see First Call Resolution (FCR) metric below.
Agent Reassignment Count	The number of times that a case has been reassigned to a different agent. The default value is 0.
Reopen Count	The number of times a case has been closed and reopened. The default value is 0.

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Customer Service Case Report form fields (continued)

Field	Definition
Skipped by Prediction	Used to identify cases that are skipped by the Predictive Intelligence feature. The default value is false (disabled).
Case	The case for which this case report was generated.
Customer Satisfaction Score	The customer gives the customer satisfaction score on accepting the case resolution.
Time to Resolve	Time taken by an agent to resolve the case. Calculated as the difference between the case resolved time and case created time.

First Call Resolution (FCR) metric

The First Call Resolution (FCR) metric relates to the number of times that a customer request is resolved during the first contact with an agent. Out of box, the First Call Resolution script returns a value of true or false.

FCR is true if a record has one update. For example, if the state of a new case is set to Closed and then updated or saved, the FCR value is True.

FCR is false if:

- A case is reopened.
- The state of a case is updated to Awaiting Info.
- An Openframe phone record exists for the case and the date of that record is prior to the case resolution date.
- An email log exists for the case, the email was not created by the system, and the email creation date is prior to the case resolution date.
- A work order entry exists for the case and the date of that work order is prior to the case resolution date.

Case task form

The case task form displays information about case tasks, which are created and assigned to users to complete the work necessary to resolve customer service cases.

The case task form includes the following fields.

Case task form fields

Field	Description
Number	The automatically assigned case task number.
Parent case	The number of the parent case. This can be a case from the Case [sn_customerservice_case] table or any child tables of the Case table.
Parent	The number of the parent record if the task is created from a type of record other than a case. This field is populated when a case task is created from a non-case record such as an incident, problem, change, or request. This field is a reference to the Task [task] table.

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Case task form fields (continued)

Field	Description
	Note: You may need to configure the case task record to display the **Parent** field.
Contact	The contact for the parent case. This field is a reference to the Contact [customer_contact] table.
Account	The account for the parent case. This field is a reference to the Account [customer_account] table.
Consumer	The consumer for the parent case. This field is a reference to the Consumer [csm_consumer] table.
Subject	The subject of the case task.
Description	A description of the work that needs to be done in order to complete the case task.
Service	If a service has been selected for a case task, the service is displayed in this field. The **Service** field is a reference to the Service Definitions table (sn_case_type_selection). **Note:** The Case Management Core plugin (com.sn_customerservice) and the Customer Service Case Types plugin (com.snc.csm_case_types) are required for the **Service** field to appear on case task lists and forms.
Priority	The assigned priority of the case task: • 1 - Critical • 2 - High • 3 - Moderate • 4 - Low (default)
State	The current state of the case task: • Open • Closed
Assigned to	The assigned user.
Service	This field is a reference to the Service [cmdb_ci_service] table.
Work notes list	Internal users who receive a notification about this case when work notes are added. You can only add internal users to the work notes list.
Work notes	Information about the case task, such as steps taken toward resolution. Internal users who have been added

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Case task form fields (continued)

Field	Description
	to the **Work notes list** receive a notification when work notes are added to a case task.
Additional comments	Customer-viewable comments. Each comment is inserted into the **Activity** field when the user selects **Post**.
Visible to customer	If this check box is enabled, the case task is visible to end users from the Customer or Consumer Portals.

Case Type form

Use the Case Type form to manage the settings for a case type.

To access a Case Type form, navigate to **Customer Service** > **Case Types** > **Manage Case Types** and select a case type from the list.

Customer Service Case Type form fields

Field	Definition
Table	The table for the case type that extends the Case table (sn_customerservice_case).
Category	An optional category for a case type. When creating cases, customer service agents can filter the available case types by category in the Select Case Type popup window. The Customer Service Case Types plugin (com.snc.csm_case_types) includes the following categories: • Onboarding • Complaint • Orders • General
Subtype	An optional sub-category for a case type. When creating cases, customer service agents can filter the available case types by category and then by subtype in the Select Case Type popup window. The **Subtype** field displays fields from the selected **Table** that are of the following type: • Choice list • Reference
Short description	A brief description of the case type.

Related links

The Case Type form includes the following related links:

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- **View Case Type Configuration**: View the current configuration for this case type table.
- **Launch Guided Setup for Case Types**: Go to the Case Types setup tasks in Customer Service Guided Setup.
- **Launch Guided Setup for AWA**: Go to the Advanced Work Assignment (AWA) setup tasks in Agent Workspace Guided Setup.
- **Launch Guided Setup for Agent Workspace**: Go to the Agent Workspace for CSM setup tasks in CSM Guided Setup.

Related lists

The Case Type form related lists display items configured for the case type table. Use the related lists to create additional configurations.

- Record Producers
- State Flows
- Special Handling Notes
- Notification Triggers
- SLAs
- Email Templates
- Quick Messages
- Reports

Contact Relationship form

The Customer Service Management application uses the Contact Relationship form to store information about the account, contact, and assigned responsibility in a contact relationship.

Contact Relationship form fields

Field	Definition
Account	The account to which the contact is assigned. This field is automatically filled in.
Contact	The customer contact selected to fulfill the role or responsibility. The Contacts list includes contacts from any related partner or account as well as contacts from the account hierarchy.
Responsibility	The role or responsibility selected for this customer contact. **Note:** As part of creating a responsibility definition, the admin can specify if the responsibility is unique. If so, the responsibility can only be assigned to one contact per account. For more information, see Create account teams.

External Organization form

In the Customer Service Management (CSM) application, the Service Model Foundation uses the External Organization (formerly External Business Location (EBL)) form to store information about an external business location. This information includes the staff members assigned to that location, cases, sold products, and install base items created for customers.

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Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

External Organization form fields

Field	Definition
Number	Automatically generated number of the external business location. By default, location numbers start with the prefix EBL.
Name	Name of the external organization.
Type	Type of organization. Select any one of the following: • Business location: Physical location of a business where a business operates • Business group: An organization that might also consist of a collection of parent and child companies operating as a single entity.
Business function	Type of functions offered at a business location. Select the following business function: • Service: Select this type if a business location provides service-related functions, such as providing support, or resolving cases for accounts, consumers, or other business locations. • Sales: Select this type if a business organization (formerly business location) provides sales-related activities, such as creating or managing orders, generating quotes, handling opportunities or leads, managing pricing, offering product recommendations, or supporting account-based selling for accounts, consumers, or other business locations. • Service and Sales: Select both service and sales if the business location is providing both service-related and sales-related activities. **Note:** You can create and manage orders and cases by selecting both types of business functions.
Manager	Manager of the external business location. **Note:** Both internal and external users can be added as managers for external business locations.

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External Organization form fields (continued)

Field	Definition
Parent Business Organization	Parent of the business location. Use this field to create a parent-child hierarchy.
Street	Street address of the external business location.
City	City where the external business location is located.
State/Province	State or province where the external business location is located.
ZIP/Postal code	ZIP code or postal code for the external business location.
Customers served	Types of customers who are served at a business location. Customers served can be defined using two options: • **All Customers**: Enables service organization staff to create and resolve issues for all the customers. • **Criteria-based**: Enables service organization staff to create and resolve issues only for customers associated with the service organization using a criteria. Associate a channel partner to add roles in the Service Organization tab.
Excluded from hierarchy overrides	Enabling this, the hierarchy agents can't view the location or its details.
Website	Web address for the internal business location.
Email	Email ID used by the internal organization.
Phone	Phone number for the internal organization.
Open date	Date on which the business location becomes operational and available for customers.
Close date	Date on which the business location becomes non-operational and unavailable for customers. **Note:** The closed date must not be earlier than the open date.
Status	Current status of the business location whether In progress, Operational, non-operational, or closed.
Description	Description of the business location.

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External organization related lists

The External Organization form includes the following related lists.

Related lists for the External Organization form

Related list	Description
Members	Internal and external users who have been added as staff members at this business organization. • Staff members can create cases for customers at their business locations. • Staff members can access customer cases and information where the **Service Organization** field on the Case form matches their business organizations. For more information about adding staff members to an external organization, see Add staff members to a business location.
Child External Organizations	List of external organization records. For more information about creating external organizations , see Create an external business location.
Assignment Groups	List of all associated assigned groups of the internal organization. For more information, see Setting up assignment groups.
Available Services	List of services supported by the business organization . For more information, see Setting up products and available services at a business location.
Customer Projects	List of all projects assigned to the business organization. Select a project to see **Project Tasks**, **Sub Projects**, and **Cases** assigned to the project. **Note:** • A location manager can see projects of their respective and child business locations. To learn more about roles, see Service Model Foundation roles. • A list of project tasks under the customer project tab is visible only if the **Visible to Customer** is selected during project task creation.

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Related lists for the External Organization form (continued)

Related list	Description
	To learn more about project creation, see Create customer projects. To learn more about project task creation, see Create a project task from a project.
Organization Customer Criteria	List of customers supported by an external organization. For more information about associating customer criteria to an external organization, see Define the configuration type for customers or business locations.
Cases Requested by Location	Cases that have been created and requested by this location. For more information about assigning cases to an external organization, see Create and manage cases for a business location.
Cases Assigned to Location	Cases that have been created and assigned to this location. For more information about creating and managing cases, see Create and manage cases for a business location. **Note:** This tab appears only if the business function is set as Service.
Account Staff Relationships	Relationships that have been created between staff members and accounts at this location. Account staff relationships are created using the Account Manager responsibility. For more information about creating an account staff relationship, see Create an account staff relationship.
Consumer Staff Relationships	Relationships that have been created between staff members and consumers at this location. Consumer staff relationships are created using the Relationship Manager responsibility. For more information about creating a consumer staff relationship, see Create a consumer staff relationship.
Household Staff Relationships	Relationships that have been created between staff members and households at this location.

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Related lists for the External Organization form (continued)

Related list	Description
	Household staff relationships are created using the Relationship Manager responsibility. For more information about creating a household staff relationship, see Create a household staff relationship.
Sold Products	Sold products that have been created for customers at this location. To learn more about creating and managing sold products for an external organization, see Create and manage sold products for a business location.
Install Base Items	Install base items that have been created for customers at this location. For more information about creating and managing install base items for an external organization, see Create and manage install base items for a business location.

Related topics

Create an internal business location

Service Model Foundation relationships

Household form

Service Model Foundation uses the household form to store details about a consumer household, including its members, their relationships, and any cases, entitlements, or contracts associated with them.

Household form fields

Field	Definition
Name	The name of the household.
Number	The automatically generated number of the household. By default, household numbers start with the prefix HOLD.
Head of household	The consumer in charge of the household. • When creating a household record, select a consumer from the Consumer table. • When updating an existing household record, select a consumer from the current members of the household.
Street	The street address of the household.
City	The city in which the household resides.

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Household form fields (continued)

Field	Definition
State/ Province	The state or province in which the household resides.
ZIP/Postal code	The ZIP code or postal code for the household.
Country	The country in which the household resides.
Notes	Additional information about the household.

Household related lists

The Household form includes the following related lists.

Household form related lists

Related list	Description
Current Members	The consumers who are current members of the household.
All Members	Current and past members of a household. As members are added or removed from a household, the member history is retained in this related list.
Member Relationships	Relationships that have been created between members of this household. Member relationships are created using the Authorized Representative responsibility. Household members that have an Authorized Representative relationship with another household member can act on behalf of that member and can manage cases for that member.
Household Team	Relationships that have been created between internal users and this household. Household staff relationships are created using the Relationship Manager responsibility. Internal users that have a Relationship Manager relationship with a household can manage all the cases for that household.
Cases	Cases that have been created for this household and the members of this household.

Related topics

Create or update a household

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Internal Business Location form

In the Customer Service Management (CSM) application, the Service Model Foundation uses the Internal Business Location (IBL) form to store information about an internal business location. This information includes the staff members assigned to that location, cases, sold products, and install base items created for customers.

Important: Some table and field labels have been changed across recent releases. For a mapping of former labels to current labels, see Service Model Foundation renamed Entities.

Internal Business Location form fields

Field	Definition
Number	Automatically generated number of the internal business location. By default, the location numbers start with the prefix IBL.
Name	Name of the internal business location.
Type	Type of organization. Select any one of the following: • Business location: Physical location of a business where a business operates • Business group: An organization that might also consist of a collection of parent and child companies operating as a single entity.
Business function	Type of functions offered at a business location. Select the following business function: • Service: Select this type if a business location provides service-related functions, such as providing support, or resolving cases for accounts, consumers, or other business locations. • Sales: Select this type if a business location provides sales-related activities, such as creating or managing orders, generating quotes, handling opportunities or leads, managing pricing, offering product recommendations, or supporting account-based selling for accounts, consumers, or other business locations. • Service and Sales: Select both service and sales if the business location is providing both service-related and sales-related activities. **Note:** You can create and manage orders and cases by selecting both types of business functions.
Manager	Manager of the internal business location. **Note:** Only internal users can be added as managers for the internal business locations.
Parent Internal Business Location	Parent of the business location. Use this field to create a parent-child hierarchy.
Street	Street address of the internal business location.
City	City where the internal business location is located.
State/ Province	State or province where the internal business location is located.

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Internal Business Location form fields (continued)

Field	Definition
ZIP/Postal code	ZIP code or postal code for the internal business location.
Customers served	Type of customers who are served at a business location. The customers served can be defined with two options: • **All Customers**: Enables service organization staff to create and resolve issues for all the customers. • **Criteria-based**: Enables service organization staff to create and resolve issues only for customers associated with the service organization using certain criteria. Associate a channel partner to add roles in the Service Organization tab.
Excluded from hierarchy overrides	Enabling this, the hierarchy agents can't view the location or its details.
Website	Web address for the internal business location.
Email	Email ID used by the internal business location.
Phone	Phone number for the internal business location.
Open date	Date on which the business location becomes operational and available for customers.
Close date	Date on which the business location becomes non-operational and unavailable for customers. **Note:** The closed date must not be earlier than the open date.
Status	Current status of the business location whether In progress, Operational, non-operational, or closed.
Description	Description of the business location.

Internal business location related lists

The Internal Business Location form includes the following related lists.

Internal business location related lists

Related list	Description
Members	Internal users (users with the snc_internal role) who have been added as staff members at this business location.

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Internal business location related lists (continued)

Related list	Description
	• Staff members can create cases for customers at their business locations. • Staff members can access customer cases and information where the **Service Organization** field on the Case form matches their business locations. For more information, see Add staff members to a business location.
Child Internal Business Locations	List of internal business location of the current parent business location. For more information, see Create an internal business location.
Child External Business Locations	List of external business location of the current parent business location. For more information, see Create an external business location.
Assignment Groups	List of all associated assigned groups of the internal business location. For more information, see Setting up assignment groups.
Available Services	List of services supported by the business location. For more information, see Setting up products and available services at a business location.
Organization Customer Criteria	List of customers that are supported by an internal business location. For more information, see Define the configuration type for customers or business locations.
Customer Projects	List of all projects assigned to the business location. Select a project to see **Project Tasks**, **Sub Projects**, and **Cases** assigned to the project.

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Internal business location related lists (continued)

Related list	Description
	Note: • A location contributor manager or location relationship manager can see projects of their respective and child business locations. To learn more about roles, see Service Model Foundation roles. • A list of project tasks under the customer project tab is visible only if the **Visible to Customer** field is selected during project task creation. To learn more about project creation, see Create customer projects. To learn more about project task creation, see Create a project task from a project.
Cases Requested by Location	List of all cases requested by the internal business location to work. For more information, see Create and manage cases for a business location
Cases Assigned to Location	Cases that have been created and assigned to this location. For more information, see Create and manage cases for a business location. **Note:** This tab appears only if the business function is set as Service.
Account Staff Relationships	Relationships that have been created between staff members and accounts at this location. Create account staff relationships by using the Account Manager responsibility. For more information, see Create an account staff relationship.
Consumer Staff Relationships	Relationships that have been created between staff members and consumers at this location. Create consumer staff relationships by using the Relationship Manager responsibility. For more information, see Create a consumer staff relationship.
Household Staff Relationships	Relationships that have been created between staff members and households at this location.

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Internal business location related lists (continued)

Related list	Description
	Create household staff relationships by using the Relationship Manager responsibility. For more information, see Create a household staff relationship.
Sold Products	Sold products that have been created for customers at this location. For more information, see Create and manage sold products for a business location.
Install Base Items	Install base items that have been created for customers at this location. For more information, see Create and manage install base items for a business location.

Related topics

Create an internal business location

Service Model Foundation relationships

Queue registration form for recommendation process

The Recommended Actions use the queue registration form to create queues for recommendation process.

Queue Registration form

Field	Description
Suffix	Suffix of the queue. For example, ra_processor_queue_1.
Application	Associated application name or identifier.
Queue	Title of the selected queue. For example, sn_nb_action.ra_processor_queue_1.
Automatic Job Scheduling	Option to enable the automated job schedule for the queue.
Event Processing Order	Sequence in which events are processed.
Job Configuration type	Definition of how jobs are configured or processed.
Scale Factor	Number of polling jobs created for a particular queue.

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Queue Registration form (continued)

Field	Description
	Note: Each application node gets a job and an order according to queue. The customer can increase the value up to a maximum of 3. Increasing the scale factor creates more polling jobs according to application node for that queue. For configuring queues, Only one queue with two scale factor and a 5-second poll interval is shipped out of the base system. For a higher load, adjust scale factors accordingly.
Poll Interval	The poll interval is the waiting time before the queue is processed. It determines how often the queue is polled, that is, how frequently new events are fetched. Decreasing the value to a lower number might cause acquiring most of the worker threads. Those threads are picked for RA use-case and can cause delays to other tasks on the instance. The poll interval displays the duration in: • **Days**: Shows the number of days the queue has been added. • **Hours:** Indicates the duration (in seconds, minutes, or hours) that an event has been in the queue once added.
Description	Additional details about the queue.

Service Definition form

In the Customer Service Management (CSM) application, the Service Definition form displays information about a service definition configuration. This information record stores the details about a service that is provided to customers.

Service Definition form

Field	Description
Number (deprecated)	The unique number of the service definition record. **Note:** Starting with the Washington DC release, this field has been replaced with the **ID** field.
Name	The name of the service definition.
ID	The ID of the service definition. The system auto-populates the **ID** field with the name of the service definition and replaces the spaces with underscores.

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Service Definition form (continued)

Field	Description
	The ID can contain alphanumeric characters and underscores and can be up to 40 characters in length. **Note:** The value in this field must be unique.
Table	The table that the service definition is available for, either the Case table or a table that extends the case table. For example, if the service is available for the onboarding case type, select the Onboarding Case [sn_onboarding_case] table.
Customer service type	The type of service: • Pre-sale • Post-sale • General A service type enables the system to display services based on the context.
Playbook record generator	The playbook record generator associated with the service definition. If a service definition has an associated playbook, the agent can use the playbook in a tab on the case record. For more information, see Associate a playbook with a service definition.
Image	The image associated with the service definition. Service definitions appear in the case type selector or case task type selector in a card view. The image appears in the card for a service definition along with the name and description.
Order	This value determines the order in which the services are displayed in the case type selector or other workflows. Service definitions with the lowest order value are displayed first. The default value is 100. • Service definitions with no order value appear above the ordered service definitions. • If one or more service definitions have the same order value, the system displays the service definitions in alphabetical order.
Active	Enables the service definition.
Use service catalog item	This check box enables the admin to specify the service definitions that launch record producers.
Description	The description of the service definition. Service definitions appear in the case type selector in a card view. The card includes the name, description, and image for

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Service Definition form (continued)

Field	Description
	a service definition. Customer service agents can search for services by entering keywords found in the service definition name and description.
Default table field values	One or more fields and default values from the target table (the table that you selected in the **Table** field). When a record is created for the target table for service definitions, the system uses these values to automatically fill in the record fields.

After creating and saving a service definition, the following related lists are available on the Service Definition form:

- Product Service Relationships
- Catalog Service Relationships
- Service to Service Relationships
- Service Definition Category Relationships
- Reports

Sold product form

Descriptions of the fields on the sold product form.

Sold Product

Field	Description
Name	Name of the product or service sold.
Parent Sold Product	Parent of the sold product, if applicable.
Product	Product model that the sold product belongs to.
State	
Account	Account that is associated with the sold product. **Note:** If you select an account, the **Household**, **Buyer Organization**, and **Consumer** fields are hidden. The **Consumer** field is active only when the B2B2C plugin is installed.
Billing account	Enables direct reference to the associated Billing Account on the Sold Product entity within ServiceNow® CRM allowing agents to access financial information instantly during service delivery.
Contact	Contact that is primarily responsible for the sold product.

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Sold Product (continued)

Field	Description
	Note: Only the contacts that belong to the chosen account are shown in the Contact column.
Consumer	Consumer that is associated with the sold product. **Note:** This field is active only when the B2B2C plugin is installed.
Derived price	A Boolean value that indicates whether the sold product's price is derived from other sold products. Used by backend pricing logic to determine if pricing is calculated based on contributing products.
Household	Household to which this sold product belongs to. **Note:** If you select a household, the **Buyer Organization**, **Account**, and **Contact** fields are hidden.
Buyer Organization	Internal or external entity that is involved in providing a service to the customer. **Note:** If you select a buyer organization, the **Household**, **Account**, **Contact**, and **Consumer** fields are hidden. The **Buyer Organization** field is active only when the service organization plugin is installed.
Service Offering	Service offering that is associated with the sold product. **Note:** • The **Service Offering** field may not appear by default in the user interface. If it doesn't appear, add the **Service Offering** field by using the form layout. • If the product model already has a service offering that is associated with it, this field is automatically populated.
Product Offering	Product offering that is associated with a sold product.

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Sold Product (continued)

Field	Description
	Note: The **Product Offering** field appears only to CSM agents, managers, and the contributor persona.
Quantity	Quantity of a product that is sold to a customer.
Unit of measurement	Measurement of entitlements and products that a customer has purchased. **Note:** The **Unit of measurement** field appears only to CSM agents, managers, and the contributor persona.
Offering type	Type of product offer that is associated to a sold product. **Note:** Only the sold products that have an offering type as product appear in the sold product related lists on the Accounts page. The default value of the field remains as **Product**.
Relationship type	Relationship of a sold product that supports implicit entitlements. **Note:** The default value of the **Relationship** field is **None**.
Product location	The service location of the sold product.
Contract start date and Contract end date	The existing Add order to Sold product to create Sold product state is changed to **In Preparation** if the contract start date >current date. If `current_date >= contract_start_date` and `current_date <= contract_end_date` then the state is changed to **Active**. If `current_date > end_date` then the state is changed to **Expired**.
Product specification	The product specification associated with a sold product.

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Sold Product (continued)

Field	Description
	Note: The **Product specification** field is available only if you have the Product Catalog Management Core (com.sn_prd_pm) plugin and is not available on the form by default.
Seller organization	The organization that sells and supports the products or services owned by the customer.
Deal type	Indicates the type of deal associated with the order. • Direct : The seller engages directly with the customer, with no intermediary partner involved. • Indirect : The seller engages the customer through an intermediary, such as as reseller, service provider, or distributor.
Route to market	Identifies the exact sales channel used to execute the deal: • Direct • Reseller • Distributor

Subscription & Pricing

Field	Description
Term (months)	Validity of a product or service in terms of number of months.
Subscription start date	Start date of access to a product or service.
Subscription end date	End date of access to a product or service.
Price list	Price list used to derive prices while purchasing a product or service.
Unit net price	Net price of a single unit of a sold product.
Pricing method	Pricing method associated to a sold product, whether recurring or one-time.
Periodicity	Frequency of the pricing method, whether it's weekly, monthly, annually, and so on. **Note:** You can set periodicity only if the pricing method is recurring.

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Subscription & Pricing (continued)

Field	Description
One time price	One-time price to be paid for the usage of a product or service.
Monthly recurring price	Price to be paid on a monthly basis for the usage of a product or service.
Annual recurring price	Price to be paid on a yearly basis for the usage of a product or service.
Cumulative one time price	One-time price to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Price to be paid on a monthly basis for the parent line and all child line items.
Cumulative annual recurring price	Price to be paid on a yearly basis for the parent line and all child line items.
Cumulative net price	Total value of the sum of cumulative one-time net price and cumulative monthly recurring price multiplied by term. Cumulative net price = Cumulative one time price +Cumulative monthly recurring price * Term
Unit base price	Allow users to capture the base price of the specific sold product.
Sales agreement line	Allow users to capture the sales agreement directly when creating a sold product.
Unit list price	Allow users to capture the list price of the specific sold product.

Related topics

Sold products

Create a sold product

Task Plan Template form

The Task Plan Template form displays details about a task plan template record.

The Task Plan Template form includes the following fields on the Details tab. After creating and saving a task plan template record, the system adds the Template Items tab to the form.

Task Plan Template form fields

Field	Description
Name	The name of the task plan template
Number	The automatically generated record number.
Short description	A brief description of the task plan template.

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Task Plan Template form fields (continued)

Field	Description
Target record	You can apply the task plan template to an existing record in the selected table. The**Target table** can be any extension of the Task [task] table. **Note:** This field can be empty.
Active	Enables or disables the task plan template record.
State	The task plan template can be in one of the following states: • Draft • Published
Set conditions	Use the condition builder to create one or more conditions that determine when the template is applicable.

Template item form

The Template item form displays details about a template item for a task plan template.

The Template item form includes the following fields on the Details tab.

Template item form fields

Field	Description
Number	The automatically generated record number.
Short description	A brief description of the template item.
Table	Select a table in which the system creates the template item record when the task plan template is applied. For example, if the template item is a case task, the system should create that item in the Case Task table [sn_customerservice_task].
Task plan template	Displays the number of the parent task plan template for this template item.
Order	The order in which the template item appears in the hierarchical list.
Parent	If the template item is a child of another template item, this field displays the parent item number.
Parent field identifier	The column on the selected table that captures the relationship to the parent template item.
Template item field identifier	The column on the selected table that captures the reference back to the template item that created the record. This field is available by default. The Case [sn_customerservice_case] and Case Task [sn_customerservice_task] tables include this column.

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Template item form fields (continued)

Field	Description
	This field is hidden on this form when the **Template item configuration** field on this record is populated, since the value is then taken from the referenced configuration record instead. To change the value, update the configuration and use **Save and cascade** to apply the change to existing template items.
Template execution field identifier	The column on the selected table that captures the reference to the template execution the record was created under. This field is available by default. The Case [sn_customerservice_case] and Case Task [sn_customerservice_task] tables include this column. This field is hidden on this form when the **Template item configuration** field on this record is populated, since the value is then taken from the referenced configuration record instead. To change the value, update the configuration and use **Save and cascade** to apply the change to existing template items.
Business organization field identifier	The column on the selected table that captures the reference to the associated service organization. This field is available only when the Multi Case plugin is active `com.sn_multi_case_creation`. This field is hidden on this form when the **Template item configuration** field on this record is populated, since the value is then taken from the referenced configuration record instead. To change the value, update the configuration and use **Save and cascade** to apply the change to existing template items.
Fields	This field appears when you select a table in the **Table** field. Specify the fields and the field values that the system should use to create the template item record. Use the **+**|**x** buttons to add and delete rows.

Template item condition form

The Template item condition form displays displays the conditions that apply to a that template item.

The Template item condition form includes the following fields on the Details tab.

Template item condition form fields

Field	Description
Short description	A brief description of the template item condition.
Template item	The number of the parent template item.
Condition table	The table on which the condition is applied. By default (when **Advanced** is unchecked), you select one of the following:

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Template item condition form fields (continued)

Field	Description
	• The same table as the **Target record** in the task plan template. • The parent template item's table. When **Advanced** is selected, this field instead lists tables that share the reference selected in the **Base table mapping field**.
Condition	Use this field to add the conditions for the template item. Each condition contains a field, operator, and value(s). Select **Set conditions** to display the Condition pop-up window. • Add a condition for the template item that contains a field, operator, and value. • Select **+New condition set** to add a new condition. • Select **x** to remove a condition. • Select **Set** to save the conditions and close the pop-up window
Advanced	Select this check box to instead configure the condition on a table that shares a reference with the target table or parent template item table, rather than on that table directly. When **Advanced** is selected, the **Condition table** field lists tables that share the reference selected in **Base table mapping field**. Three additional fields appear and are mandatory: **Base table**, **Base table mapping field**, and **Condition table mapping field**. Selecting or clearing this check box displays a **Change Advanced settings?** confirmation dialog before the change takes effect. See Create a template item condition for the exact behavior.
Base table	Displayed when **Advanced** is selected. Select the parent template item's table or the task plan template's target record table. This is the table that the related table in **Condition table** must share a reference with.
Base table mapping field	Displayed when **Advanced** is selected. Select a reference field on the **Base table**. The **Condition table** field then lists tables that share this same reference.
Condition table mapping field	Displayed when **Advanced** is selected. Select the field on the **Condition table** that matches the reference selected in **Base table mapping field**.

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CSM Query Rules

Query rules are used to filter the records in CSM related tables that are accessible by users with CSM roles. These filters, which are applied in query business rules and READ ACLs on CSM related tables, are stored in a metadata table.

Starting with the London release, query rules and filters were defined in the CSQueryBRUtilOOBConstants script include. In the Quebec release, these filters have been moved to the Query Rule (sn_query_rule) table.

This change applies to Query business rules (QBRs) and read ACLs on CSM related tables. Each data table that used QBRs before Quebec now has a new QBR that uses the new logic. Tables with read ACLs that used filters from the CSQueryBRUtilOOBConstants script include now have one more read ACL that uses the filters from the Query Rule table.

As a user with the sn_queryrules.admin role, you can create, update, view and delete a query rule. As a user with the role, you can view the query rules table.

Availability

The CSM query filters feature is active on zBoot instances. Existing customers must contact ServiceNow Customer Support to enable this feature.

Query rules property

The *`sn_cs_queryrules.use_query_rules`* property determines whether to use the Query Rule table or the CSQueryBRUtilOOBConstants script include. This property is set to true for zBoot instances and false for upgraded instances.

- If true, the instance uses rules and filters from the Query Rule table to determine read access to the CSM tables for the logged-in user.
- If false, the instance uses rules and filters from the CSQueryBRUtilOOBConstants and its extensions to determine read access to the CSM tables for the logged-in user.

Query Rule table

The Query Rule (sn_query_rule) table extends the sys_metadata table and stores filters for the following tables:

- Case (sn_customerservice_case)
- Affected Install Bases (sn_install_base_m2m_affected_install_base)
- Install Base Items (sn_install_base_item)
- Installed Products (sn_install_base_m2m_installed_product)
- Sold Products (sn_install_base_sold_product)
- Order Case (csm_order_case)
- Sold Product Covered (sn_install_base_m2m_contract_sold_product)
- Orders (csm_order)
- Asset (alm_asset)
- Entitlement (service_entitlement)
- Account (customer_account)
- Work Order (wm_order)

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- Contact (customer_contact)
- Contract (ast_contract)

Related topics

Granular roles and entities for responsibility framework

Components installed with Customer Service Management

Several types of components are installed with the Customer Service Management application.

Tables installed with Customer Service Management

Tables are added to your instance with the activation of the Customer Service Management (CSM) application.

Tables added with the activation of the Customer Service Base Entities plugin

The following tables are added with the activation of the Customer Service Base Entities plugin. This plugin is activated automatically by the Customer Service plugin.

Different tables names installed with Customer Service Management

Table	Description
Account [customer_account]	Stores the customer account and partner records.
Account Address [account_address_relationship]	Stores the associations between the locations (addresses) and accounts.
Account Access [sn_csm_account_access]	Stores the records that restrict the contact access to CSM entities.
Account Relationship [account_relationship]	Stores the records for the relationships that have been created between the two accounts.
Address Type [cmn_location_type]	Stores the address types for the CSM entities, such as Billing or Shipping. Address types are typically used with order cases.
Consumer [csm_consumer]	Stores the consumer records.
Consumer User [csm_consumer_user]	Stores the consumer registration records that are created when the consumers complete the self-registration process from the Consumer Service Portal. This table extends the Users table (sys_user).
Contact [customer_contact]	Stores the customer contact records.

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Different tables names installed with Customer Service Management (continued)

Table	Description
Contract Contact [contract_rel_contact]	Stores the relationships that are created between the contacts and contracts.
Household [csm_household]	Stores the consumer household records.
Entitlement [service_entitlement]	Stores the entitlement records.
Consumer Profile [sn_csm_consumer_profile]	Stores the references to the consumer and can be expanded to support multiple profiles within and across industries, with each profile having its own set of attributes in the extended table.
Consumer Profile Location [sn_csm_consumer_profile_location]	Stores the relationships between the consumer profiles and locations (addresses).

Tables added with the activation of Customer Service plugin

The following tables are added with the activation of the Customer Service plugin.

Table names and their description

Table	Description
Account Relationship Access [sn_customerservice_account_relationship_access]	Stores the type of access for the account relationships.
Account Relationship Type [sn_customerservice_account_relationship_type]	Stores the relationship types that are created for the bi-directional account relationships.
Account Team Member [sn_customerservice_team_member]	Stores the team members that are assigned to the account teams.
Agent Token [sn_customerservice_agent_token]	This table isn't currently used.
Appointment [sn_customerservice_appointment]	Stores the appointments that have been created for the customer service cases.
Asset Contact [sn_customerservice_m2m_asset_contact]	Stores the asset contact relationship records.
Case	Stores the customer service case records.

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Table names and their description (continued)

Table	Description
[sn_customerservice_case]	
Case Entitlement [sn_customerservice_case_entitlement]	Stores the entitlements associated with case records. Associated entitlements are available in the Entitlements related list on the case record. The sn_customerservice.advanced_entitlements system property controls the display of this related list.
Case Report [sn_customerservice_case_report]	Stores the key performance indicators (KPIs) and metrics for the case records.
Channel Configurations [sn_customerservice_channel_config]	Stores the customer service email channel configuration records.
Contact Relationship [sn_customerservice_contact_relationship]	Stores the contact relationship records.
Customer Interaction [sn_customerservice_customer_interaction]	Stores the interaction records for Customer Service Management (CSM).
Customer Service Case Flow [sn_customerservice_sf_case]	Stores the customer service case state flows.
Escalation [sn_customerservice_escalation]	Stores the records created for escalated cases and accounts.
Escalation Severity [sn_customerservice_escalation_severity]	Stores the escalation severity definition records.
Escalation Template [sn_customerservice_escalation_template]	Stores the escalation template records.
Registration Request [sn_customerservice_registration]	Stores the self-registration requests for the Customer Service Portal.
Related Party [sn_customerservice_related_party]	Stores the entities (such as account, contact, or consumer) that are related to the customer service cases and the responsibilities assigned to each of the entities.

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Table names and their description (continued)

Table	Description
Related Party Configuration [sn_customerservice_related_party_configuration]	Stores the related party type that provides a default responsibility definition.
Responsibility Definition [sn_customerservice_responsibility_def]	Stores the responsibility definitions that are created to support the customer accounts.
Task [sn_customerservice_task]	Stores the tasks that have been created for the customer service cases.
Responsibility Access Configuration [sn_customerservice_responsibility_access_config]	Stores the metadata of the responsibility access configuration, which specifies the level of access and the entities that can be accessed by a particular responsibility.

Properties installed with Customer Service Management

Properties are added with the activation of the Customer Service Management application.

To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter. You can narrow the list results by using the **Application** field.

You can also navigate to **Customer Service** > **Administration** > **Properties** to view a list of the most frequently used properties that you can configure for Customer Service Management.

The following table lists the properties that are used for Customer Service Management.

System properties installed with Customer Service Management

Property	Description
glide.cs.email.case_queue_address	Email case queue address. • **Type**: string • **Default value**: none • **Location**: **Customer Service** > **A**
glide.cs.email.new_case_prefix	Email subject prefix format for new • **Type**: string • **Default value**: Case: • **Location**: **Customer Service** > **A**
sn_customerservice.email.create_case_for_non_matched_user	Create case for non-matched user • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**

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System properties installed with Customer Service Management (continued)

Property	Description
glide.cs.company_name	Your company name. • **Type**: string • **Default value**: none • **Location**: System Property [sys_
glide.ui.activity.email_roles	Roles that can view the mail in the "Sent/Received Emails. • **Type**: string • **Default value**: itil, sn_customers sn_esm_location_agent, sn_esm sn_csm_ocs.ext_agent, sn_custo sn_customerservice.relationship sn_customerservice.case_contri • **Location**: System Property [sys_
glide.ui.sn_customerservice_case_activity.fields	Case activity formatter fields. • **Type**: string • **Default value**: assigned_to,asse short_description, comments, er *Email*,work_notes • **Location**: System Property [sys_
sn_customerservice.FTS_flag_enabled	Enable the follow the sun flag on th • Type: true | false • Default value: false
sn_customerservice.glide.script.block.client.globals	• **Type**: true | false • **Default value**:false • **Location**: System Property [sys_
sn_customerservice.shn_asset	Special Handling Notes for assets. • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_contact	Special Handling Notes for contact

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_product	Special Handling Notes for produc • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_account	Special Handling Notes for accoun • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.shn_case	Special Handling Notes for cases. • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Not**
sn_customerservice.portal.chat_queue	• **Type**: string • **Default value**: none • **Location**: System Property [sys_
csm.captcha.google.enabled	Enable the Google Captcha tool or portal self-registration form. • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
sn_customerservice.use_asset_contact_relationship	Restrict assets that are based on t assets. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
sn_customerservice.account_relationship_access_roles	Roles that need to be shown in the qualifier for the Account Relationsh [sn_customerservice_account_rela

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: string • **Default value**: none • **Location**: **Customer Service** > **A**
sn_customerservice.contact_role_assignment	External roles that can be assigned Service Portal. The roles stored in **Available** column on the Edit Role • **Type**: string • **Default value**: sn_customerserv sn_customerservice.partner,sn_ sn_customerservice.customer • **Location**: **Customer Service** > **A**
sn_customerservice.registration_workflow_id	Default registration workflow sys_i • **Type**: string • **Default value**: 9b6cf2dac313020 • **Location**: System Property [sys_
sn_customerservice.consumer_max_products	Maximum registered products per • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **A**
com.snc.cs_base.last.generated.code.tree.path	Property that gets created by the s customer_account record is insert **Account Code** value for the most r in the Account [customer_account When a new customer account rec this property to determine a uniqu account. The property is then upda value so that the next account cod value for the next account record i property for more details. • **Type**: string • **Default value**: none • **Location**: System Property [sys_ **Note:** If this property is reset attempts to create new accou already in use, which can resu

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System properties installed with Customer Service Management (continued)

Property	Description
sn_customerservice.enable_knowledge_kcs	Knowledge Centered Services (KC Management. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
skills_management.migration	List of task tables to migrate to the when an administrator runs the **Mi** script. • **Type**: choice list • **Default value**: wm_task,custome • **Location**: System Property [sys_
sn_customerservice.rest.api.case_sla_async	Enable asynchronous processing using a REST API. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
com.snc.skills_management.task_skill_migrated_tables	List of tables where the **Skills** field Task Skills [task_m2m_skill] table. property, the data has been migrat • **Type**: choice list • **Default value**: none • **Location**: System Property [sys_
sn_customerservice.case_fields_to_sync	Comma-separated list of fields tha child cases. • **Type**: string • **Default value**: priority,state,com resolution_code • **Location**: **Customer Service** > **A**
sn_customerservice.parent_child_case_sync	Synchronize fields from parent to c • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
sn_customerservice.parent_child_case_sla_async	Processes SLA asynchronously du and synchronization.

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
sn_csm_case_types.enable_service_selector	Enables the Case Type Selector fo records: • Interaction • Account • Contact • Consumer • Sold Product • Install Base Item • Related lists: child case, case ta • List view • Case task list view • **Type**: true | false • **Default value**: true **Note:** The `sn_csm_case_types.e` property is set to true for zB enabled for upgrade custom • **Location**: System Property [sys_
glide.ui.sn_customerservice_escalation_activity.fields	Escalation activity formatter fields. • **Type**: true | false • **Default value**: false • **Location**: System Property [sys_
sn_customerservice.kcs.enable_template_on_case_workspace	Enables creation of knowledge arti template from a customer service • **Type**: true | false • **Default value**: false • **Location**: System Property [sys_
sn_customerservice.case.autoresponder.enable	Enables sending content as recom using the Auto-Responder feature.

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A**
sn_customerservice.case.autoresponder.customportal	Custom portal URL that contains th such as sys_kb_id or kb_number. Example: https://<instance-name> id=kb_article_view&sys_kb_id={sys • **Type**: string • **Default value**: none • **Location**: **Customer Service** > **A**
sn_customerservice.contact_relationship.restrict_within_account_hierarchy	Create a contact relationship with hierarchy. When set to **false**, users are allowe with any account. When set to **true** hierarchy will be shown. • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
sn_bus_loc.int_bus_loc.onboard_location_manager_as_contributor	Assign the sn_customerservice.sv role to the internal business locati the system property is set to **true**. internal business location manage sn_customerservice.svc_location_ • **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
enable_account_address_sharing	Enable an existing address to be a The associations are present in the table. Setting the property back to inappropriate behavior for accoun • **Type**: true| false • **Default value**: true • **Location**: System Property [sys_
sn_customerservice.create_case.description_enable_html_editor	Enable the flag to add description Create Case form page.

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System properties installed with Customer Service Management (continued)

Property	Description
	• **Type**: true | false • **Default value**: true • **Location**: System Property [sys_
sn_customerservice.emails.customportal	Base URL for custom portals. • **Type**: string • **Default value**: none • **Location**: System Property [sys_
sn_query_rules.number_of_nq_ops_zing_search_supports	Defines the number of query rules data. • **Type**: string • **Default value**: 10
sn_customerservice.consumer_max_new_cases_daily	Defines the maximum number of n create in a day. • **Type**: integer • **Default value**: 10 • **Location**: **Customer Service** > **A** **Note:** This restriction only ap consumer.
sn_customerservice.consumer_max_comments_per_case_daily	Defines the maximum number of c add for a case in a day. • **Type**: integer • **Default value**: 25 • **Location**: **Customer Service** > **A** **Note:** This restriction only ap consumer.
sn_customerservice.consumer_max_attachments_per_record	Defines the maximum number of a attach to a record. • **Type**: integer • **Default value**: 5 • **Location**: **Customer Service** > **A** **Note:** This restriction only ap consumer.

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System properties installed with Customer Service Management (continued)

Property	Description
sn_cs_queryrules.use_query_rules	Rules or filters from the sn_query_r access to customer service manag logged-in users through query bus the system property is set to **True**. from the `CSMQueryBRUtilOOB` are used. • **Type**: true | false • **Default value**: true • **Location**: **Customer Service** > **A**
sn_customerservice.advanced_entitlements	This property displays or hides the case records. • **Type**: true | false • **Default value**: false • **Location**: **Customer Service** > **A** If **true**: • The Case Entitlements related lis • The **Entitlement** field on the Cas If **false**: • The **Entitlement** field is visible o • The Case Entitlements related lis

Roles installed with Customer Service Management

The Customer Service Management application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users.

Primary roles

Customer Service Management provides several primary roles that support the following business models:

- Business-to-business (B2B): With this business model, you can support accounts and contacts. Additionally, you can create relationships and account teams to support your customers.
- Business-to-consumer (B2C): With this business model, you can support individual consumers.

These roles ensure access to data while maintaining data security for different types of business relationships.

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CSM primary roles

Internal Roles	External Roles
Business-to-business (B2B) • sn_customerservice_agent • sn_customerservice_manager	**Business-to-business (B2B) Customer** • sn_customerservice.customer • sn_customerservice.customer_admin • sn_customerservice.customer_case_manager
Business-to-consumer (B2C) • sn_customerservice.consumer_agent • sn_customerservice_manager	**Business-to-business (B2B) Partner** • sn_customerservice.partner • sn_customerservice.partner_admin
	Business-to-consumer (B2C) sn_customerservice.consumer

For details about these roles, see CSM roles and descriptions below.

Internal and external roles

Customer Service Management includes both internal and external user roles.

- Internal roles are assigned to users within your organization. These roles are for agents and managers using the Customer Service Management application to support customers.
- External roles are assigned to users outside your organization. These roles are for customers, customer partners, and consumers using the self-service portals.

With these roles, you can give both internal users and external users access to your instance. This role structure gives you the flexibility to provide different levels of access to different users. As an additional security measure, every user must have at least one role so that the instance can distinguish between internal and external users.

Base roles

The primary roles available in Customer Service Management are based on the following base roles:

- sn_esm_agent
- sn_esm_admin
- sn_esm_partner
- sn_esm_partner_admin
- sn_esm_user
- sn_esm_user_admin

For more information about these roles, see Roles installed with the Customer Service Base Entities plugin below.

For more information about the CSM primary role structure and included roles, see CSM roles and descriptions below.

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Explicit roles

You may have business requirements that change the use of these roles. In addition, the Explicit Roles in CSM feature may assign both internal and external roles to external users. It is important to regularly review user role assignments to ensure that they are set according to your business requirements.

For more information about reviewing and updating user role assignments, see:

- KB0829930
- Fix external user role assignments

CSM roles and descriptions

Primary CSM roles

Role title [name]	Description	Contains roles
Customer service agent [sn_customerservice_agent]	An agent who assists customers and partners with questions, issues, and problems. This user creates cases, views and edits cases, and works with customers and subject matter experts to resolve cases. A customer service agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.	• knowledge • chat_admin • sn_customerservice.deescalation_requester • timecard_user • template_editor • sn_esm_agent • sn_shn.editor • domain_expand_scope **Note:** The sn_esm_agent role contains the cmdb_read role.
Customer service manager [sn_customerservice_manager]	Customer service agent with the additional responsibility for managing agents or agent groups and overriding agent actions.	• sn_customerservice_agent • timecard_manager • timecard_approver • skill_admin • sn_app_cs_social_social_profile_user • sn_customerservice.consumer_agent • asset • sn_shn.admin • sn_publications.approver • contract_manager • sn_app_cs_social_log_user • awa_manager • sn_majorissue_mgt.major_issue_manager

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
		• email_client_quick_message_author • workspace_admin • skill_model_user • sn_templated_snip.template_snippet_writer • approver_user **Note:** For customers upgrading to Xanadu, the approver_user role replaces the approval_admin role. Users with the customer service manager role can approve the approval requests that are assigned to them. • notify_view **Note:** The notify_view role is added to the sn_customerservice_manager role only when the Chat Zoom Connector application is installed.
Consumer service agent [sn_customerservice.consumer_agent]	An agent who assists consumers with questions, issues, and problems. This user creates, views, and edits cases and works with consumers to resolve cases. An agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.	• sn_esm_agent • chat_admin • sn_shn.editor • template_editor • knowledge
Customer [sn_customerservice.customer]	Customer role for researching questions, issues, or problems. Customers can create cases and view and edit existing cases for themselves. They can also view a list of assets belonging to their accounts.	• sn_esm_user • snc_external

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
Customer administrator [sn_customerservice.customer_admin]	Administrator role for a customer account. This user has access to data within the account.	• sn_customerservice.customer • sn_esm_user_admin
Customer case manager [sn_customerservice.customer_case_manager]	Customer role for managing the cases in an account and any related child accounts. The customer case manager role includes the privileges of the customer role and adds the following privileges: • Create a case on behalf of another contact in the account. • View a list of cases belonging to the account. • Edit cases belonging to the account. **Note:** The customer case manager role is not automatically added to the **sn_customerservice.contact_role_assignment** system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.	sn_customerservice.customer
Partner [sn_customerservice.partner]	Partner who is serving customer accounts. A partner can create a case for their own account or on behalf of a customer account. A partner can view and edit all of the cases that they have created: • For their own account. • On behalf of customer accounts that they are related to.	• sn_customerservice.customer • sn_esm_partner

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Primary CSM roles (continued)

Role title [name]	Description	Contains roles
	Note: If you are establishing a new relationship between a partner and a customer, the partner or partner admin does not have access to historic cases created for the customer. This is because the historic cases do not have the **Partner** or **Partner Contact** fields populated on the Case form.	
Partner administrator [sn_customerservice.partner_admin]	Administrator role for a partner account. The partner administrator can do the following: • Access the data within the partner account. • Access the data created by the contacts in their company in the customer account. • Manage users for the partner account and for customer accounts. • View all of the cases created by a partner.	• sn_customerservice.partner • sn_customerservice.customer_admin • sn_esm_partner_admin
Consumer [sn_customerservice.consumer]	Consumer role for researching questions, issues, or problems. Consumers can create cases and view and edit existing cases for products that they have purchased. They can also view a list of their products.	• sn_esm_user • snc_external

Additional CSM roles

Role title [name]	Description	Contains roles
Case contributor editor [sn_customerservice.case_contributor_editor]	This role provides limited write access to the fields on the Case form. It provides limited write access to those cases for which the user already has	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	read access provided by another role. Limited write access is available for the following fields: • Work notes • Additional comments • Attachments • State or stage changes • Contributor users • Contributor groups • Watchlist • Work notes list	
Case contributor viewer [sn_customerservice.case_contributor_viewer]	This role provides read-only access to all of the tables associated with a case. With this role, a user can view the information in the related lists for a case if: • The user has been added to the **Contributor User** field or the **Contributor Group** field on the Case form. • The user has read-only access to cases through another role, such as the case viewer role (sn_customerservice.case_viewer). With this role, a user can access the following modules in CSM Agent Workspace:**All tasks I participate in**	• sn_shn.user • wm_read
Case task agent [sn_customerservice.case_task_agent]	This role provides access to case tasks and related case information. A user with this role can work on the following case tasks: • Tasks that are assigned to the user or to the user's assignment groups. • Tasks that have been created by the user.	• sn_customerservice.customer_data_viewer • sn_customerservice.csm_workspace_user • sn_customerservice.case_contributor_editor

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	With this role, the user can: • View and update assigned case tasks. • Create case tasks and assign those tasks to other users. • View and update created case tasks. • Add work notes, comments, and attachments to case tasks. • Update the status of case tasks. • Perform additional actions from a case task such as sending email. With this role, users have read-only access to customer information for the case: • Account and contact records (for B2B cases) • Consumer and household records (for B2C cases) • Service organization records (business location cases)	
Case task viewer [sn_customerservice.case_task_viewer]	This role provides read-only access to all case task records. **Note:** When combined with the case viewer role (sn_customerservice.case_viewer), a user can access all customer service cases and all case tasks.	
Case viewer [sn_customerservice.case_viewer]	This role provides read-only access to all cases.	
Contact manager [sn_customerservice.contact_manager]	User who can manage contacts.	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
Customer project manager [sn_customerservice.projectmanager]	A user who creates and manages projects for customer accounts. • Creates new projects. • Sets up project tasks and resource plans. • Identifies customer contacts who have access to projects and project tasks. • Assigns and manages tasks and dependencies. **Note:** This role is added with the Customer Project Management plugin (com.snc.csm_ppm)	sn_customerservice.customer_data_viewer
Customer project stakeholder [sn_customerservice.projectstakeholder]	A user who is responsible for activities that require viewing customer project details and project tasks. **Note:** This role is added with the Customer Project Management plugin (com.snc.csm_ppm)	
Customer Data viewer [sn_customerservice.customer_data_viewer]	User with read-only access to customer data entities such as: • Install base items • Contracts • Entitlements • Accounts, contacts, and account team members • Assets • Consumers • Sold product	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	Note: Starting with the Australia release, the Customer Data Viewer [sn_customerservice.customer_data_viewer] role has extended access to the following tables: • Account Relationship [account_relationship] • Account Relationship Type [sn_customerservice_account_relationship_type] • Contact Relationship [sn_customerservice_contact_relationship] • Account Consumer [sn_acct_consumer_account_consumer] • Consumer Team Member [sn_customer_rel_consumer_to_user] • Consumer to Consumer Relationship [sn_customer_rel_consumer_to_consumer] • Household Member Relationship [sn_customer_rel_household_member_relationship] • Household Team Member [sn_customer_rel_household_to_user] • Responsibility Definition [sn_customerservice_responsibility_def] • Related Party Configuration [sn_customerservice_related_party_configuration] Additionally, it also has access to the following menu modules and workspace lists. • Menu modules: Customer, Partners, Contacts, Consumers, and Households • Workspace lists: Partners	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
De-escalation requester [sn_customerservice.deescalation_requester]	User who can deescalate a case or account when the cause of the escalation is resolved.	sn_customerservice.escalation_requester
Escalation requester (sn_customerservice.escalation_requester)	User who can request an escalation for a case or account.	sn_customerservice.consumer_agent
Proxy case creator [sn_customerservice.proxy_case_creator]	Users with the proxy case creator role can create customer service cases directly from community questions created by contacts or consumers	
Proxy contact [sn_csm_proxy_cont]	Role that enables employees to create cases for customer accounts and contacts. Employees can also be proxy case contacts on behalf of customers. Assign this role to employees in your company who are not fulfillers or do not have other CSM-specific roles. Users with this role can: • Create customer service cases using a record producer. • Add work notes and comments to any case. • Update the watch list of any case. **Note:** The Customer Proxy Contacts (com.snc.csm_proxy_contacts) plugin adds this role.	
Workspace user [sn_customerservice.csm_workspace_user]	This role provides access to case tasks from the following modules in CSM Agent Workspace: • My Case Tasks • My Group's Case Tasks Users can also:	

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Additional CSM roles (continued)

Role title [name]	Description	Contains roles
	• Use Agent Assist to search for knowledge articles (if the User Criteria is set to provide access to knowledge). • Create email (if the user has write access to the record and the email_composer role). • View response templates (if response templates have been configured for the record. **Note:** By default, this role is added to the case task agent role (sn_customerservice.case_task_agent).	

For detailed information on the granular admin roles in Custmer Data Foundation (CDF) and their associated privileges, see Platform security granular admin roles.

Roles installed with the Customer Service Base Entities plugin

The following roles are installed with the Customer Service Base Entities plugin.

Customer Service Base Entities roles

Role	Description	Contains roles
CSM admin [csm_admin]	Provides admin access to all CSM features and data.	• sn_shn.admin • sn_res_shaper.admin
Service management agent [sn_esm_agent]		• assignment_workbench • wm_read • cmdb_read • agent_schedule_user • interaction_agent • sn_publications_recipients_list_user
Service management partner [sn_esm_partner]		sn_esm_user
Service management user admin		sn_esm_user

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Customer Service Base Entities roles (continued)

Role	Description	Contains roles
[sn_esm_user_admin]		
Service management admin [sn_esm_admin]		None
Service management user [sn_esm_user]		• snc_external • sn_apptmnt_booking.appointment_booking_
Service management partner admin [sn_esm_partner_admin]		• sn_esm_user_admin • sn_esm_admin
Role for REST APIs related to CSM web services [csm_ws_integration]		snc_internal

Related topics

Fix external user role assignments

Internal user data

Internal user data includes information about the users who are internal to your organization, such as managers, agents, and other employees. Internal users can also belong to user groups.

A user is an individual who can access your instance and a group is a set of users who share a common purpose. The users associated with a group are listed as group members.

User roles provide access to customer service features, capabilities, and data. The following user roles are available in the Customer Service Management application for internal users:

- Customer service agent [sn_customerservice_agent]
- Consumer service agent [sn_customerservice.consumer_agent]
- Customer service manager [sn_customerservice_manager]

For detailed descriptions about user roles, see Roles installed with Customer Service Management.

Business Stakeholder for Customer Service Management

Business Stakeholder for Customer Service Management includes plugins and roles that provide access to business stakeholder features.

Customers who have purchased the Customer Service Management Subscription product may provide Business Stakeholder users with the rights to the following actions:

- Create cases on behalf of a customer or a service organization.
- View cases, case tasks, and customer data.

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- View and drill through reports.
- Approve requests.

Roles for business stakeholder users

You can assign the following roles to any user who is a business stakeholder.

Create cases on behalf of customers

Role	Description	Contains roles	Plugin	User type
Account contributor [sn_customerservice.account_contributor]	This role enables users to create cases for any account.	sn_customerservice.case_contributor	CSM Contributor User (com.snc.csm_contributor_user) **Note:** This plugin is moved to App Store beginning with Australia release.	Internal and external
Case authorized contributor [sn_customerservice.case_authorized_contributor]	This role enables users, when added to an individual case as a related party, to: • Add additional comments and attachments • Receive notifications on case updates • Accept or reject a solution • Close a case	• sn_customerservice.case_write_granular • sn_customerservice.case_related_party_write_granular	CSM Contributor User (com.snc.csm_contributor_user) **Note:** This plugin is available in the App Store.	Internal

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Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	Note: To perform the tasks, you must have at least one fulfiller license (such as csm_agent, sn_customerservice_agent, or sn.customerservice.svc_location_agent) in addition to this role.			
Consumer contributor [sn_customerservice.consumer_contributor]	This role enables users to create cases for any consumer.	sn_customerservice.case_contributor	CSM Contributor User (com.snc.csm_contributor_user) **Note:** This plugin is available in the App Store.	Internal and external
Relationship contributor [sn_customerservice.relationship_contributor]	This role enables users to create cases for those customers with which they have an established relationship.	sn_customerservice.case_contributor	CSM Base Extension Entities (com.snc.cs_base_extension)	Internal and external
Location Relationship Manager [sn_bus_loc.location_relationship_manager]	This role enables users to view cases across all the external business locations where they have sn_bus_loc.location_relationship_manager responsibility.	sn_customerservice.svc_location_manager	Business Location (com.snc.business_location)	Internal contributor
Location Manager Contributor [sn_customerservice.svc_location_manager_contributor]	This role enables users to create, update, view, and approve cases. They can also register and remove staff across all business	• sn_customerservice.consumer_contributor • sn_customerservice.svc_location_manager • sn_customerservice.service_organization_contributor • sn_customerservice.account_contributor	Business Location (com.snc.business_location)	Internal and external

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Create cases on behalf of customers (continued)

Role	Description	Contains roles	Plugin	User type
	locations they manage.			

Create cases as proxy contact

Role	Description	Plugin	User type
Proxy contact [sn_csm_proxy_cont]	This role enables employees to create cases for customer accounts and contacts.	Customer Proxy Contacts (com.snc.csm_proxy_contacts)	Internal

For more information about the proxy contact role, see Create cases as a proxy contact.

Create cases on behalf of service organizations

Role	Description	Contains roles	Plugin	User type
Service organization contributor [sn_customerservice.service_organization_contributor]	This role enables users to create cases for their business location.	sn_customerservice.case_contributor, location	Business Location (com.snc.business_location)	Internal and external

Approve orders

Role	Description	Plugin	User type
Order approver [sn_csm_om.order_approver]	Users with this role can view customer orders and product catalog data and can approve customer orders. They cannot create, update, or delete orders. **Note:** This requires subscription to Order Management.	Order Management (com.sn_csm_order_mgmt)	Internal

View cases, case tasks, and customer data

Role	Description	Plugin	User type
Account order viewer [sn_csm_om.account_order_viewer]	This role provides read-only access to	Order Management (com.sn_csm_order_mgmt)	Internal

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View cases, case tasks, and customer data (continued)

Role	Description	Plugin	User type
	orders, order lines, and order tasks.		
Business location viewer [sn_bus_loc.viewer]	This role provides read-only access to business locations. **Note:** This role provides unrestricted access to view all business locations regardless of other access controls.	Business Location (com.snc.business_location)	Internal
Case viewer [sn_customerservice.case_viewer]	This role provides read-only access to all cases.		Internal
Case task viewer [sn_customerservice.case_task_viewer]	This role provides read-only access to all case tasks. **Note:** When combined with the case viewer role (sn_customerservice.case_viewer), a user can access all customer service cases and all case tasks.		Internal
Consumer order viewer [sn_csm_om.consumer_order_viewer]	This role provides read-only access to orders, order lines, and order tasks.	Order Management (com.sn_csm_order_mgmt)	Internal
Customer data viewer [sn_customerservice.customer_data_viewer]	This role provides read access to customer data, including account, consumer, and household data, and the information included in the related lists.		Internal

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View cases, case tasks, and customer data (continued)

Role	Description	Plugin	User type
Household viewer [sn_csm_household.viewer]	This role provides read-only access to all households. **Note:** This role provides unrestricted access to view all households regardless of relationship or other access controls.	Customer Household Data Model (com.snc.household)	Internal
Service organization viewer [sn_service_org.viewer]	This role provides read-only access to service organizations. **Note:** This role provides unrestricted access to view all service organizations regardless of other access controls.	Service Organization (com.snc.service_organization)	Internal

View and drill into reports and dashboards

Role	Description	User type
Performance Analytics viewer [pa_viewer]	This role can: • View Analytics Hub. • Create thresholds and targets for indicators. • Read, update, and delete the thresholds and targets that are created. • View text analytics widgets on dashboards.	Internal

View projects and project tasks

Role	Description	Contains roles	User type
Project Stakeholder	This role can:	sn_customerservice.project_stakeholder	Internal

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View projects and project tasks (continued)

Role	Description	Contains roles	User type
[sn_customerservice.projectstakeholder]	• View all projects. • View project information. • View project task information.		

Related topics

Business stakeholder role for PPM

Business stakeholder role for APM

Installed with Business Stakeholder

Explicit Roles in CSM

You can give both internal users and external users access to your instance. However, you might not want both types of users to have the same level of access. To provide added security, every user must have at least one role so that the instance can distinguish between internal and external users.

As of the Paris release, no user can have both of the explicit roles (snc_internal and snc_external). Groups and role containment cannot include both roles, either, since that would cause any group member or user who is assigned to such a group or such a role to automatically have both roles. The ServiceNow AI Platform aborts any operation that would create such a scenario.

External users must obtain, at minimum, the snc_external role. The snc_external role indicates that the user is external to your organization. They should not have any access to resources unless explicitly allowed through ACLs for the snc_external role or additional roles that inherit the snc_external role. By default, users with the snc_external role can't access:

- Tables without the role that inherits the snc_external role or the public role.
- Non-record type resources, such as processors and UI pages without granting access to the snc_external role or a role that inherits the snc_external role.
- Platform Analytics dashboards.

Do not mark the snc_internal role as elevated. Otherwise, internal users cannot access the instance.

Recommended CSM roles for internal and external users

Customers (external users) using the Customer Service Management application should be assigned either the sn_customerservice.customer or the sn_customerservice.consumer role. Customer service agents (internal users) should be assigned either the sn_customerservice_agent or sn_customerservice_consumer_agent role. The system ensures that the same user is not assigned both a customer (external) and agent (internal) role.

Explicit Roles plugin

The Case Management Core plugin (com.sn_customerservice) activates the Explicit Roles plugin (com.glide.explicit_roles), which adds the snc_external and snc_internal roles. When the plugin is activated:

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- All users must have either the snc_internal role to access internal resources or the snc_external role to access external resources.
- All existing users are automatically assigned the snc_internal role. This role does not change existing access levels or system behavior. Instead, it provides a category to differentiate internal users from external users. All internal users maintain the same level of access as before the plugin was activated.

  Tip: To prevent changing existing functionality for users, activating the Explicit Roles plugin assigns the snc_internal user role to all existing users in the instance. This includes any external users added before the Explicit Roles plugin was activated. After the Explicit Roles plugin is activated, do the following for all external users added before the Explicit Roles plugin was activated:

  - Remove the snc_internal role.
  - Add the snc_external role.

  Doing the preceding ensures that external users added before activating the Explicit Roles plugin do not have access to internal resource that should be available only to internal users.

- Newly created users are automatically assigned the snc_internal role when they first attempt to log in to the instance, unless they have been explicitly assigned the snc_external role. You can add the snc_external role to a new user before they first log in to the instance to provide external user rights.

  Important: Activate this plugin during a maintenance window or when few users are logged in. Users currently logged in when the plugin is activated will not be dynamically assigned the snc_internal role. Rather, users must log out and log back in to be assigned the snc_internal role. Once the plugin is activated, you can add or remove the snc_internal and snc_external roles at any time to change user rights.

- All existing ACLs that do not have a role requirement are automatically assigned the snc_internal role. Because both existing ACLs and roles are assigned the snc_internal role, existing access levels do not change.
- Newly created ACLs that do not have a role requirement are automatically assigned the snc_internal role. This role assignment does not apply to a newly created ACL with a role assigned.
- For all existing Processor [sys_processor] records or newly created Processor [sys_processor] records with **Type=script**, the snc_internal role is automatically added to the **Roles** field if the field is empty.
- To restrict access to UI pages to internal users, the plugin automatically assigns the snc_internal role to the * ACL with a **Type** of **ui_page**.
- To restrict access to processors to internal users, the plugin automatically assigns the snc_internal role to the * ACL with a **Type** of **processor**.
- External users must obtain, at minimum, the snc_external role to access the instance. This role is automatically assigned to external Customer Service Portal contacts. If the Customer Service Portal is not activated, this role must be manually granted to external users'. Access to records is granted through ACLs.

  Note: You can use the `isPublic()` function in scripts for Customer Service Portal to change the privacy setting for a single client-callable script include. For more detail, see Script includes.

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- Content Management System site access is also affected. CMS is set up with Sites (content_site), Pages (content_page), and other resources. Some of the sites may have the **Login page** configured.
  - If CMS sites do not have the **Login page** configured, the public role is automatically added to the **Read Roles** field on Pages (content_page) if the field is empty.
  - If CMS sites have the **Login page** configured, the snc_internal role is automatically added to the **Read Roles** field on Pages (content_page) if the field is empty.
- Service Portal site access is also affected.

  The snc_internal role is not automatically added to sp_page, sp_widget or sp_instance records. If desired, you can give new records the role by assigning snc_internal as a default value in the **Roles** field for these records. For details on this process see Specify a default field value.

Do not move System update sets among instances with and without the Explicit Roles plugin enabled.

Note: This plugin also requires the Contextual Security Manager plugin.

The glide.security.explicit_roles.internal_user_blacklist property

The Explicit Roles plugin assumes that all existing users in the sys_user table at the time the plugin is installed are internal customers. A fix script assigns the snc_internal role to all existing users and to any ACL that does not have a role.

The fix script may fail or may not finish in time for a user who has not been updated with the role and who attempts to access a resource. To bridge this potential gap, the Contextual Security Manager (CSM) auto-assigns the snc_internal role to any user who logs in and does not have an explicit role (either internal or external).

Additionally, CSM has a business rule process that assigns the snc_external role to a classification of their users. However, when importing large sets of CSM external customers, workflow is set to false, so business rules don't run. As those users attempt to access a resource, they do not have any explicit roles. The Contextual Security Manager assigns the snc_internal role through a scheduled job called On-Call Gaps Conflicts Report that runs every 7 days. When the Explicit Roles plugin is active, this job assigns the snc_internal role to the CSM external user, since the user does not have either the snc_internal or snc_external role.

To prevent inadvertently providing the snc_internal role to external users, the Explicit Roles plugin includes a *`glide.security.explicit_roles.internal_user_blacklist`* property to exclude user types from ever becoming snc_internal. If there are no users types in the glide.security.explicit_roles.internal_user_blacklist table, the Contextual Security Manager assigns all users the snc_internal role by default. If there are classnames in the blacklist table, and if the sys_user class type is in the blacklist table, CSM assigns the snc_external role. Otherwise, CSM assigns the default snc_internal role as usual.

For the Paris release, this property is enabled by default for zBoot instances and and disabled by default for upgrades.

Providing table access to external users

You can provide external users access to a table by adding a role to the table that inherits the snc_external role. For more information, see Provide external users access to a table.

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The hasRoles() method

The `hasRoles()` method is still available, but is deprecated in the Geneva release. Use the `hasRole(role name)` method instead.

If you do use the `hasRoles()` method, note these changes:

- This method automatically excludes the default snc_internal role when it checks for roles. This means that if a user has only the snc_internal role, the `hasRoles()` method still returns **false**.
- If the user has the snc_external role, the method returns **false** because the instance considers external users to be without a role.

Mutual exclusion: snc_external versus snc_internal

The ServiceNow AI Platform prevents users from having both the snc_external role and the snc_internal role. The ServiceNow AI Platform applies this mutual exclusion everywhere in the system and writes error messages to the logs for each conflict.

Note: ACLs can have both roles if the ACL resources should be accessible to all users.

Example: Adding both explicit roles to a user (direct collision):

1. Assign user Abel Tuter the snc_internal role.
2. Assign user Abel Tuter the snc_external role.

Result: Adding the snc_external role fails because Abel Tuter has the snc_internal role.

Example: Adding both explicit roles to a group (direct collision):

1. Consider a group called Test Group that currently has no explicit roles assigned to the group.
2. Add Abel Tuter to the Test Group.
3. Add the snc_external role to Test Group.

Result: Adding the snc_external role fails because Abel Tuter already has the snc_internal role and can't have both roles.

Example: Adding an explicit role to a group where a group member has the conflicting explicit role (indirect collision):

1. Assign user Abel Tuter the snc_internal role.
2. Consider a group called Test Group that currently has no explicit roles assigned to the group.
3. Add Abel Tuter to the Test Group.
4. Add the snc_external role to the Test Group.

Result: Adding the snc_external role to the group fails because Abel Tuter would inherit the snc_external role through group membership. Both explicit roles would be assigned to the same user, which isn't allowed.

For other examples, see the following table:

Role	Attempted action	Result
Direct collision		

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Role	Attempted action	Result
The user has the snc_internal role.	Add the snc_external role.	The action is aborted.
The user has the snc_external role.	Add the snc_internal role.	The action is aborted.
The user has no explicit role.	Add the snc_internal or snc_external role.	The role is added.
The user has both explicit roles (existing collision).	Add the user to a group with no roles.	The action is aborted.
A role not associated with any users contains the snc_internal role.	Add the snc_external role.	The action is aborted.
A role not associated with any users contains the snc_external role.	Add the snc_internal role.	The action is aborted.
A role contains both explicit roles (existing collision).	Add the role to a user, role, or group.	The action is aborted.
A group with no members has the snc_internal role.	Add the snc_external role.	The action is aborted.
A group with no members has the snc_external role.	Add the snc_internal role.	The action is aborted.
A group with no members has no roles.	Add the snc_internal or snc_external role.	The role is added.
Indirect collision		
Role containment with collision	**1.** Grant a role called Test Role to a user with the snc_internal role. **2.** Add the snc_external role Test Role.	The action is aborted.
Role containment without collision	**1.** Grant a role called Test Role to a user with no roles. **2.** Add the snc_external role to Test Role.	The role is added to both the user and Test Role.
Group containment with collision	**1.** Add a user who has the snc_internal role to a group called Test Group 2 (child of Test Group 1).	The action is aborted.

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Role	Attempted action	Result
	2. Add the snc_external role to Test Group 2. 3. Add the snc_external role to a parent group called Test Group 1 (parent of Test Group 2).	
Group containment without collision	1. Add a user with no roles to a group called Test Group 2 (child of Test Group 1). 2. Add the snc_external or snc_internal role to Test Group 1 (parent of Test Group 2).	The role is added to the parent group, the child group, and the user.
Group containment plus role containment with collision	Add contains_external to Test Group 1, the parent of Test Group 2.	Test Group 1 and Test Group 2 both get contains_external, but don't explicitly get the snc_external role.
	Add the snc_internal role to Test Group 2, the child of Test Group 1.	The action is aborted.
Group parent change plus group containment	1. Remove Test Group 1 as the parent of Test Group 2. 2. Add the snc_internal role to Test Group 1. 3. Add the snc_external role to Test Group 2. 4. In Test Group 2, set Test Group 1 as the parent group and save.	The action is aborted. Repeat for already nested groups, with the same expectation.

The cause of an aborted action appears in the error message and must be addressed before another attempt succeeds.

For direct cases, such as adding an explicit role to an individual user, verify which explicit role the user should have. If the user has the wrong explicit role, it must first be removed, and then the correct explicit role must be added.

For indirect cases,such as adding an explicit role to a group (so that a group member would be assigned both explicit roles), evaluate whether that user should be in the group. Also determine whether the group should be given the explicit role, including any inheritance through group hierarchy and role containment.

Note that the ServiceNow AI Platform reports only the first potential collision encountered. If repeated attempts continue to fail after remediation, with a new root cause each time, re-evaluate the relevant user/group/role interdependence more broadly. You may want to rethink how groups and role containments are structured.

Provide external users access to a table

To enable users with only the snc_external role to access the list view of a table, you must create a series of ACLs.

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Before you begin

Role required: security_admin

Procedure

1. Elevate to a privileged role.
2. Create an ACL rule with the following settings:
   - **Type**: ui_page
   - **Operation**: read
   - **Name**: {table_name}_list
   - **Required role**: snc_external
3. On the default **read** ACL for the table, add **snc_external** in the Required role list. Create the ACL if it does not already exist.
4. Use these settings to create another ACL:
   - **Type**: ui_page
   - **Operation**: read
   - **Name**: {table_name}
   - **Required role**: snc_external
5. Use these settings to create another ACL to give the user write access to a field in the table:
   - **Type**: record
   - **Operation**: create
   - **Name**: {table_name} {column_name}
   - **Required role**: snc_external

   Repeat this step for every field that you want to give the user write access to. Use an asterisk * instead of the column name to provide access to all fields at once.

Creating custom user roles

System administrators can create custom roles or modify the access of existing roles by using script includes and extension points/instances.

The Customer Service Management application uses platform ACLs and query business rules to restrict data access based on user roles. If needed, users with the administrator role can create custom roles or modify the access of existing roles by using script includes and extension points/instances.

- The script includes store JavaScript functions and classes to handle the role access control logic.
- Extension points/instances designate places where custom scripts can be called and then processed to extend base functionality.

The administrator can use the extension points/instances to create their own role access constants file similar to CSQueryBRUtilOOBConstants.

The administrator can create an extension instance for the existing extension point and use it to define custom role configuration constants. The following items are included with the Customer Service Management application:

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- global.CSQeryExtensionPoint: the provided extension point for CSM role configuration
- instance.CSQueryExtensioninstanceOOB: the provided extension instance for CSM role configuration

To create a role:

1. Create a constant file to hold the configurations for the new role similar to CSQueryBRUtilOOBConstants. For example:

```
CSQueryBRUtilOOBConstantstest.ROLE_PERMISSIONS_POOL = {

 'sn_customerservice.customer_new_role':{ 'sn_customerservice_c
ase':{'condition':['my_new_condition']},
} ,
```

2. Create an extension instance to hold the logic returning this new constant file to CSQueryBRUtil.
3. Make sure that this role is on the instance and contains the sn_esm_user role.
4. Assign this new role to a contact.
5. Create or modify the ACLs and query business rules for this role as necessary.

For more information about modifying ACLs and query business rules, see KB0685767.

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

Script includes installed with Customer Service Management

Script includes are added with activation of Customer Service Management.

Script includes installed with Customer Service Management

Script include	Description
CSEMailUtil	Used for customer service case email actions and notifications.
CSPortalUtil	Helper functions for the customer self-service portal.
AccountTeamUtil	Util APIs for the Customer Service Management account team responsibility module.
AjaxCustomerServiceSearch	Ajax class that provides the knowledge base search results.

Client scripts installed with Customer Service Management

Client scripts are added with activation of Customer Service Management.

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Client scripts installed with Customer Service Management

Client script	Table	Description
Channel and State readonly for customer	Case [sn_customerservice_case]	Sets the **Channel** and **State** fields to read only the Case form that the customer can view from the customer portal.
Check Contextual Security Installed	Contact [customer_contact]	Checks if the Contextual Security plugin (com.glide.role_management) is installed befor creating a customer contact.
Customer Case View	Case [sn_customerservice_case]	Hides certain elements in the Case form for ES view.
Empty Case form on Account Change	Case [sn_customerservice_case]	When you change the value in the **Account** fie on the Case form, the values in the following fields are cleared: **Partner**, **Partner contact**, **Asset**, **Entitlement**, **Contract**, and **Contact**.
Empty Partner Contact on Partner Change	Case [sn_customerservice_case]	When you change the value in the **Partner** fiel on the Case form, the **Partner contact** field is also cleared.
Hide Activity Stream	Contact [customer_contact]	Hides the activity stream on top of the form header.
Hide attachment icon	Registration Request [sn_customerservice_registration]	Hides the attachment icon on top of the form header.
Hide Icons Form Header	Case [sn_customerservice_case]	Hides the email icon from the more options me and the activity stream icon at the top of the fo header. Also hides the book icon next to the **Short Description** field on the form.
Hide Suggestion next to Short Description	Case [sn_customerservice_case]	Hides the suggestion icon next to the **Short description** field.
Make field readonly	Account Relationship Type [sn_customerservice_account_relationship_type]	Sets the **From** and **To** fields to read only once a record is created in the Account Relationship Type table (sn_customerservice_account_relationship_typ
Open the glide list for new appointment	Appointment [sn_customerservice_appointment]	Opens the glide list to select the user for an appointment for new records.
Populate Contact Company	Case [sn_customerservice_case]	When a user name is selected in the **Contact** field, the **Account** field is populated with the contact's account information.

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Client scripts installed with Customer Service Management (continued)

Client script	Table	Description
Populate Contract	Case [sn_customerservice_case]	Populates the **Contract** field when the **Accoun** field is filled.
Populate contract and entitlement	Case [sn_customerservice_case]	Populates the **Contract** and **Entitlement** fields when the **Account** field is filled.
Populate Entitlement	Case [sn_customerservice_case]	Populates the **Entitlement** field when the **Account** field is filled.
Populate Product	Case [sn_customerservice_case]	When an asset is selected in the **Asset** field, the **Product** field is populated with the asset's product model.
Registration code read-only	Registration Request [sn_customerservice_registration]	Sets the **Registration code** field to read-only.
Set account read on load	Account Team Member [sn_customerservice_team_member]	Sets the **Account** field to read only for a new record when the account isn't empty on form load.
Set asset readonly	Asset Contact [sn_customerservice_m2m_asset_contact]	Set the **Asset** field to readonly for a new form when the asset value isn't empty.
Show partner field	Case [sn_customerservice_case]	Shows the **Opened by** field on the Case form.
Special Handling Notes for Case	Case [sn_customerservice_case]	Shows all the Special Handling Notes with disp type alert related to the current record.
Validate Product Entitlement	Entitlement [service_entitlement]	Displays a field warning message for the **Per unit** field if a product is selected but the **Asset**, **Contract**, and **Account** fields are empty.

Business rules installed with Customer Service Management

Business rules are added with activation of Customer Service Management.

The following table describes the business rules and their related tables that are added with Customer Service Management.

Business rules added with Customer Service Management

Business rule	Table	Description
Account query for customer	Account	Queries the account for the customer contact.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
	[customer_account]	
Account relationship display rule	Account Relationship [account_relationship]	Displays the correct values in the bi-directional diagram on the Account Relationship form.
Add customer role to contacts	Contact [customer_contact]	Adds the customer role (sn_customerservice.customer) to a customer contact if the contact has no assigned roles or if the user ID for the contact is set.
Add snc external role to contacts	Contact [customer_contact]	Adds the snc_external user role to each contact.
Add Primary Contact to Asset Contact	Asset [alm_asset]	When an asset is assigned a new primary contact, the primary contact is added to the asset contact.
Approver query for customer	Approval [sysapproval_approver]	Queries the approver for a customer contact.
Asset query for customer	Asset [alm_asset]	Queries the assets for a customer contact.
Auto assessment business rule	Case [sn_customerservice_case]	Triggers a customer satisfaction survey when a case is set to **Closed**.
Case query for customer	Case [sn_customerservice_case]	Queries the cases for a customer contact.
Case display rule	Case [sn_customerservice_case]	A display business rule on the Case form which passes some values to the browser when a case is displayed.
Change Awaiting to Open	Case [sn_customerservice_case]	Changes the case state from **Awaiting Info** to **Open**.
Check duplicate	Asset Contact [sn_customerservice_m2m_asset_contact]	Checks for duplicate records before creating a new asset contact.
Check duplicate for responsibility	Contact Relationship [sn_customerservice_contact_relationship]	Checks for duplicate responsibilities before creating a new contact relationship.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
Check duplicate for responsibility	Asset Contact [sn_customerservice_m2m_asset_contact]	Checks for duplicate responsibilities before creating a new asset contact.
Check snc_external roles exist	Contact [customer_contact]	Checks if the com.glide.security_schema plugin is activated.
Contact query for customer	Contact [customer_contact]	Queries the contacts for a customer.
Contract query for customer	Contract [ast_contract]	Queries the contracts for a customer.
Create bi-direction relationship	Account Relationship [account_relationship]	After an account relationship is created, this business rule creates the bi-directional account relationship record.
Delete Account Contacts and Assets	Account Relationship [account_relationship]	When an account relationship is deleted, this business rule deletes the corresponding account and asset contacts.
Delete relationship type	label [account_relationship_type]	Checks to see if any relationship records are using a relationship type before that relationship type is deleted.
Delete responsibility definition	Responsibility Definition [sn_customerservice_responsibility_def]	Checks to see if any account team members are using a responsibility definition before that responsibility definition is deleted.
Display request message	Registration Request [sn_customerservice_registration]	After registration request submittal, shows info message to user
Display rule	Registration Request [sn_customerservice_registration]	Shows message to remind users to enter a correct registration code
Entitlement query for customer	Entitlement [service_entitlement]	Queries the entitlements for a customer contact.
Insert Case Work Notes	Appointment [sn_customerservice_appointment]	Updates the case work notes with the appointment details when an an appointment is created.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
Populate company for case	Case [sn_customerservice_case]	Populates the **Company** field on the Case form based on the name entered in the **Contact** field.
Set First Response Time	Case [sn_customerservice_case]	When a case is created or updated, this rule sets the current time in the first_response_time field. Also used when a case is set to **Resolved** or **Awaiting Info** or when comments or close notes are added. **Note:** The first_response_time field is not used.
Update account based on reg code	Registration Request [sn_customerservice_registration]	Validates the registration registration code and assigns the account associated with the registration code.
Update account relationship labels	Account Relationship Type [sn_customerservice_account_relationship_type]	When the labels for an account relationship type are updated, this business rule updates all of the related account relationship records.
Update case entitlement on Close	Case [sn_customerservice_case]	Updates the associated entitlement when the state of a case is set to **Closed**.
Update Case Work notes	Appointment [sn_customerservice_appointment]	Adds work notes to the case when an appointment for the case is updated.
Update Case Work Notes	Knowledge [kb_knowledge]	Adds work notes to the case when a knowledge article associated with the case gets updated.
Update Parent Case for new task	Task [sn_customerservice_task]	Updates the case when a new case task is created.
Update Parent case for state change	Task [sn_customerservice_task]	Updates the case when a new case task is changed.
Update relationship label	Account Relationship [account_relationship]	Updates the relationship labels for bi-directional account relationships.

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Business rules added with Customer Service Management (continued)

Business rule	Table	Description
Update User Task State	Case [sn_customerservice_case]	Calculates the work load for the agent based on the number of cases assigned to the agent. Also updates the last assigned time. This rule is used by the matching rule engine.
Validate registration	Registration Request [sn_customerservice_registration]	Checks if the registration is valid based on the user's email address. If the user exists in the system or a request has already been submitted and is in the pending state, the registration request is not allowed.

Components installed with CSM workspaces

Several types of components are installed with CSM workspaces.

Roles

The agent workspace user role (agent_workspace_user) is added to the Service Management agent (sn_esm_agent) role. The role is required to access Agent Workspace for CSM.

Form views

Customer service agents see forms in the CSM Workspace form view (workspace_csm), if they exist for certain record types. Otherwise, agents see forms in the Workspace form view.

Tables

In CSM workspaces, a number of Customer Service Management tables are provided with the Workspace and CSM Workspace view layouts.

Tables in Workspace view

The Workspace view is provided for the following tables:

- Case (sn_customerservice_case)
- Consumer (csm_consumer)
- Account (customer_account)
- Contact (customer_contact)
- Account Relationship (account_relationship)
- Asset (alm_asset)
- Contract (ast_contract)
- Product Model (cmdb_model)
- Entitlement (service_entitlement)
- Task (sn_customerservice_task)

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- Appointments (sn_customerservice_appointment)
- Contact Relationship (sn_customerservice_contact_relationship)
- Escalation (sn_customerservice_escalation)
- Order (csm_order)
- Order Case (csm_order_case)
- Special Handling Notes (sn_shn_notes)
- Order Line Item (csm_order_line_item)
- Asset Contact (sn_customerservice_m2m_asset_contact)
- Account Team Member (sn_customerservice_team_member)
- Social Profiles table (sn_app_cs_social_social_profile)
- Social Logs table (sn_app_cs_social_social_log)
- Knowledge Applied to Tasks table (m2m_kb_task)

Tables in CSM Workspace view

The CSM Workspace view (workspace_csm) is provided for the following tables:

- Interaction (interaction)
- Location (cmn_location)

The CSM Workspace view for these tables is similar to the respective default platform interface view.

Lists

The list categories and filtered lists that have been configured for customer service agents in CSM workspaces.

Lists and filtered lists for Customer Service agents

List Category	Filtered Lists	Description
Cases	My Cases	Cases assigned to the customer service agent.
	My Open	Open cases assigned to the customer service agent.
	Unassigned for my groups	Cases that belong to any of the customer service agent's groups but have not been assigned to an agent.
	All	All customer service cases.
Major Issue Management	Major Cases	Major cases that have been accepted.
Customer	Accounts	A list of customer accounts.
	Partners	A list of partner accounts.
	Contacts	A list of customer contacts.
	Consumers	A list of consumers.

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Lists and filtered lists for Customer Service agents (continued)

List Category	Filtered Lists	Description
Interactions	My Interactions	Interactions that are assigned to the customer service agent (agent's name appears in the **Assigned to** field on the interaction record).
Knowledge	My Knowledge Articles	Knowledge articles authored by the customer service agent (agent's name appears in the **Author** field). **Note:** This list appears in the list panel when the Knowledge Management Advanced Installer plugin (com.snc.knowledge_advanced.installer) is activated.
Catalog Tasks	Assigned to my groups	Catalog tasks assigned to the current agent's groups.

Note: Additional filtered lists appear in the list panel when a customer service agent also has the itil role.

Components installed with additional plugins for Customer Service Management

Several types of components are installed with the additional plugins for the Customer Service Management application.

Components installed with additional plugins for CSM

Components installed with CTI Softphone	• Tables • Business rules • Script includes
Components installed with Customer Service CTI Demo Data	Business rules
Components installed with OpenFrame	• Tables • Roles • Business rules • Script includes • UI macros
Components installed with Special Handling Notes	• Tables • Roles • Properties • Business rules

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Components installed with additional plugins for CSM (continued)

	• Client scripts • Script includes
Components installed with Targeted Communications	• Tables • Roles • Properties
Components installed with Knowledge Product Entitlements	• Business rules • Properties
Components installed with Self Service Password Reset	Script includes

Components installed with CTI Softphone

Several types of components are installed with CTI Softphone.

Tables installed with CTI Softphone

Tables are added with activation of CTI Softphone.

Tables for activation of CTI Softphone

Table	Description
User CTI Status	Stores the agent's availability status.

Script includes installed with CTI Softphone

Script includes are added with activation of CTI Softphone.

Script include	Description
CTIAjaxUtility	Ajax class that provides helper functions to set and get user states, get incoming call context, log a call, and queue and dequeue a call.

Business rules installed with CTI Softphone

Business rules are added with activation of CTI Softphone.

Business rule	Table	Description
Route available user for Incident Task	User CTI Status [user_cti_status]	Demo business rule to dequeue a call based on matching rules whenever an agent becomes available.

Components installed with Customer Service CTI Demo Data

Several types of components are installed with Customer Service CTI Demo Data.

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Note: Starting with the Yokohama release, Customer Service CTI Demo Data is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. ServiceNow Voice with Amazon Connect provides the latest experience for this functionality.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Business rules installed with Customer Service CTI Demo Data

Business rules are added with activation of Customer Service CTI Demo Data.

Business rule	Table	Description
Route available user for Case Task	User CTI Status [user_cti_status]	Used to dequeue a call whenever an agent becomes available.

Components installed with OpenFrame

Several types of components are installed with OpenFrame.

Tables installed with OpenFrame

Tables are added with activation of OpenFrame.

Tables installed with OpenFrame

Table	Description
Phone Log [sn_openframe_phone_log]	A log of the incoming and outgoing phone calls. This table can be used to log any phone call made or received.
OpenFrame Configuration [sn_openframe_configuration]	Stores the OpenFrame configuration. This is the configuration used to load the OpenFrame in the TopFrame.

Roles installed with OpenFrame

The OpenFrame user role is automatically added when you activate OpenFrame.

Role	Description	Contains role
User [sn_openframe_user]	The OpenFrame user role.	None
User sn_openframe_api_user	The OpenFrame API user role	None

Script includes installed with OpenFrame

The OpenFrameAjaxUtility script include is added when you activate OpenFrame.

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Script includes for OpenFrame

Script include	Description
OpenFrameAjaxUtility	OpenFrame AJAX utility class that provides functions to get the OpenFrame configuration and also to get and set the last opened frame location.

Business rules installed with OpenFrame

Some related business rules are added when you activate OpenFrame.

OpenFrame business rules

Business rule	Table	Description
Set Agent	Phone Log [sn_openframe_phone_log]	Sets the agent in the Phone Log [sn_openframe_phone_log] table as the current logged-in user if a phone call is logged without an agent.
One Default Configuration	OpenFrame Configuration [sn_openframe_configuration]	Checks that there's only one default OpenFrame configuration. You can't have two OpenFrame configurations if the default option is set to true.
Update Task Work Notes	Phone Log [sn_openframe_phone_log]	Updates the work notes for a specific task whenever a phone call is logged for that task.

UI macros installed with OpenFrame

Related UI macros are added when you activate the OpenFrame plugin.

The UI macros added when you activate OpenFrame plugin are supported under the following conditions:

- The *doctype* property is set to true and the device is not a tablet or mobile.
- The web browser is Internet Explorer 10 or above.

As a system administrator, you can add the following UI macro scripts:

OpenFrame UI macro scripts

Script include	Description
show_phone	• This macro requires the activation of the OpenFrame plugin. • By configuring this UI macro using the *ref_contribution* parameter, you can display a phone icon next to the sys_user reference field if the phone field in the sys_user record is populated with the user's contact number.
show_phone_customer_service	• This macro requires the activation of the Customer Service Management and the OpenFrame plugins. • By configuring this UI macro using the *ref_contribution* parameter, you can display a phone icon next to the **Contact**

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OpenFrame UI macro scripts (continued)

Script include	Description
	customer_account reference field on the case form if the phone field in the Contact customer_account record is populated with the user's contact number.

Displaying the phone icon enables you to make calls using the click-to-call capability in the OpenFrame window. For more information on how to use OpenFrame, see OpenFrame overview.

Related topics

UI Macros

Components installed with Special Handling Notes

Several types of components are installed with Special Handling Notes.

Tables installed with Special Handling Notes

The tables included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following tables.

Table	Description
Special Handling Notes [sn_shn_notes]	Stores the special handling notes.
Special Handling Configuration [sn_shn_configuration]	Stores the special handling notes table configurations.

Roles installed with Special Handling Notes

Some user roles are included with the Special Handling Notes (com.sn_shn) plugin.

Special handling notes roles

Role	Description
sn_shn.admin	Can read, create, update, and delete special handling notes. This role contains the sn_shn.editor role. The sn_customerservice_manager role contains the sn_shn.admin role.
sn_shn.editor	Can read and update special handling notes. This role contains the sn_shn.user role. The sn_customerservice_agent role contains the sn_shn.editor role.
sn_shn.user	Can read special handling notes.

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Properties installed with Special Handling Notes

Some properties are included with the Special Handling Notes (com.sn_shn) plugin.

The Special Handling Notes plugin adds the following properties.

Special handling notes properties

Property	Description
Maximum number of notes displayed in the Special Handling Notes pop-up window [sn_shn.max_num_alerts]	• **Type**: integer • **Default value**: 20 • **Location**: **Special Handling Notes** > **Properties**
Display special handling notes only once per session [sn_shn.note_preferences]	Special handling notes are displayed each time you access a record. Enable this property to display special handling notes only once per session. • **Type**: true | false • **Default value**: false • **Location**: **Special Handling Notes** > **Properties**
Width of the Special Handling Notes pop-up window in pixels [sn_shn.popup_width]	The width of the Special Handling Notes pop-up window in pixels. The default width is 500. If you specify less that 300, the window automatically uses the minimum width of 300 pixels. • **Type**: integer • **Default value**: 500 • **Location**: **Special Handling Notes** > **Properties**

To learn more about the special handling notes properties, see Configure special handling notes properties.

Business rules installed with Special Handling Notes

The business rules included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following business rules.

Business rules installed with the Special Handling Notes plugin

Business rule	Table	Description
Updating the table field	Special Handling Notes [sn_shn_notes]	Populates the **Table** field with the table label rather than the whole table name.
SHN Cache Table Entry	Special Handling Notes Configuration [sn_shn_configuration]	Stores the entries in the configuration table in a cache to avoid repeated queries.

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Client scripts installed with Special Handling Notes

The client scripts included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following client scripts.

Client scripts

Client script	Table	Description
On Load Message	Special Handling Notes Configuration [sn_shn_configuration]	On Load Message describing what the Special Handling Notes Configuration table is for. Create a configuration by selecting a table for which special handling notes can be created and displayed. Include notes for related entities by selecting the desired fields and adding them to the configuration.

Script includes installed with Special Handling Notes

The script includes included with the Special Handling Notes plugin (com.sn_shn).

The Special Handling Notes plugin adds the following script includes.

Script includes for special handling notes

Script include	Description
SHNProcessor	A collection of APIs for special handling notes.
SHNTable	Provides a list of tables for which the user can create special handling notes.

Components installed with Targeted Communications

Several types of components are installed with the Targeted Communications application.

Tables installed with Targeted Communications

Tables are added with activation of Targeted Communications.

Tables installed with Targeted Communications

Table	Description
Recipients (Users) [sn_publications_recipientslist_user_m2m]	Stores recipients lists of type Internal Users.
Recipients (Accounts) [sn_publications_recipientslist_account_m2m]	Stores recipients lists of type Accounts.
Recipients (Consumers) [sn_publications_recipientslist_consumer_m2m]	Stores recipients lists of type Consumers.
Publication Recipients	Stores recipients lists of type Contacts.

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Tables installed with Targeted Communications (continued)

Table	Description
[sn_publications_publication_contact_m2m]	
Workflow Config [sn_publications_workflow_config]	Workflow configuration page.
Publication [sn_publications_publication]	Stores all publications.
Recipients List [sn_publications_recipients_list]	Stores the recipient lists.
Recurrence [sn_publications_recurrence]	Stores all of the publication recurrences.

Roles installed with Targeted Communications

Roles are added with activation of Targeted Communications.

Roles installed with Targeted Communications

Role title [name]	Description	Contains roles
Publications administrator [sn_publications.admin]	The publications administrator can: • read all publications • create, update, and delete publications • create recurring publications • create recipient lists • add or remove approvers to workflows	• sn_publications.author • sn_publications.approver • workflow_publisher • image_admin
Publications author [sn_publications.author]	The publications author can:	• sn_publications_recipients_list_user • sn_publications_recipients_user

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Roles installed with Targeted Communications (continued)

Role title [name]	Description	Contains roles
	• read all publications • create, update, and delete publications • create recurring publications • create recipient lists	• workflow_publisher • image_admin
Publications approver [sn_publications.approver]	The publications approver can approve publications.	approver_user
Recipients list user [sn_publications_recipients_list_user]	The recipients list user can create and view recipient lists.	None
Recipients user [sn_publications_recipients_user]	The recipients user can view recipient lists.	None

Properties installed with Targeted Communications

Properties are added with activation of Targeted Communications.

Note: To open the System Property [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Property	Description
sn_publications.max_email	Limits the number of email recipients. • **Type**: integer • **Default value**: 100000 • **Location**: System Property [sys_properties] table

Components installed with Knowledge Product Entitlements

Several types of components are installed with the Knowledge Product Entitlements application.

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Business rules installed with Knowledge Product Entitlements

Business rules are added with activation of Knowledge Product Entitlements.

Knowledge Product Entitlements business rules

Business rule	Table	Description
Knowledge Product Entitlement	Knowledge [kb_knowledge]	Implements the needed access controls for users with the sn_customerservice.customer role.
KB Product Entitlements	Knowledge Base [kb_knowledge_base]	

Properties installed with Knowledge Product Entitlements

Properties are added with activation of Knowledge Product Entitlements.

Properties added with Knowledge Product Entitlements

Property	Description
kb_product_entitlement.knowledge_base.enable	Enable access control of Knowledge Bases based on product entitlements. If enabled, customers can access all of the knowledge bases related to the products for which they have entitlements. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**
kb_product_entitlement.knowledge_base.allow_empty_products	Allow access to Knowledge Bases with empty **Related Products** field. If enabled, customers can access all knowledge bases even if no products have been specified in the **Related Products** field on the Knowledge Base form.

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Properties added with Knowledge Product Entitlements (continued)

Property	Description
	• **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**
kb_product_entitlement.article.enable	Enable access control of Knowledge Articles based on product entitlements. If enabled, customers can access all of the knowledge articles related to the products for which they have entitlements. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**
kb_product_entitlement.article.allow_empty_products	Allow access to Knowledge Articles with empty **Related Products** field. If enabled, customers can access all knowledge articles even if no products have been specified in the **Related Products** field on the Knowledge form. • **Type**: true/false • **Default value**: false • **Location**: **Knowledge Product Entitlements** > **Properties**

Components installed with Self Service Password Reset

Several types of components are installed with Self Service Password Reset.

Script includes installed with Self Service Password Reset

Script includes are added with activation of Self Service Password Reset.

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Script includes for self service password reset

Script include	Description
PasswordResetAJAX	AJAX Script to process a password reset from a UI Page as guest.
ResetPwdAjaxProcessor	

Components installed with Engagement Messenger

Several types of components are installed with activation of the Engagement Messenger application, including plugins, tables, and user roles.

Roles installed

Roles installed with the activation of the Engagement Messenger application

Role title [name]	Description	Contains roles
Engagement Messenger admin [sn_csm_ec.ec_admin]	Creates and edits configurations for Embedded Messenger modules	• sn_csm_ec.ec_read • snc_platform_rest_api_access • virtual_agent_admin • image_admin • sp_admin • ais_admin • catalog_builder_editor
Engagement Messenger read [sn_csm_ec.ec_read]	Can view existing configurations for Embedded Messenger modules **Note:** This role should only be assigned to internal users.	None

Granular roles installed with the activation of the Engagement Messenger application

Role title [name]	Description	Contains roles
[sn_csm_ec.ec_admin]	Role required to have granular admin access for engagement messenger tables and Rest APIs.	None

Tables installed

Tables added with the activation of the Engagement Messenger application

Table	Description
Chat Feature Instance [sn_csm_ec_chat_instance]	Stores configuration details of the Chat feature of the messenger modules.

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Tables added with the activation of the Engagement Messenger application (continued)

Table	Description
Engagement Messenger Module [sn_csm_ec_engmnt_center_module]	Stores the list of all messenger modules.
Feature [sn_csm_ec_feature]	Stores the feature definitions for the messenger. Every feature instance of a messenger module is created from its feature definition.
Feature Instance [sn_csm_ec_feature_instance]	Stores the details of feature instances of the messenger module.
Greeting Feature Instance [sn_csm_ec_greeting_instance]	Stores configuration details of the Greeting feature of the messenger modules.
Knowledge Feature Instance [sn_csm_ec_knowledge_instance]	Stores configuration details of the Knowledge feature of the messenger modules.
Search Feature Instance [sn_csm_ec_search_instance]	Stores configuration details of the Search feature of the messenger modules.

Properties installed with Engagement Messenger

Engagement Messenger properties

Property	Description
com.glide.cs.embed.csp_frame_ancestors	After activating the Glide Virtual Agent plugin (com.glide.cs.chatbot), you must use the *com.glide.cs.embed.csp_frame_an* system property to enable the configuration o frame-ancestors policy for the website where to host Engagement Messenger. Set the value of the *com.glide.cs.embed.csp_frame_an* system property 'self' `<your website URI` example, 'self' `https://www.example.c` • Type: string • Value: self • Location: System Properties
glide.authenticate.multisso.enabled	Set the *glide.authenticate.multisso.ena* system property to true to enable multiple pro SSO.

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Engagement Messenger properties (continued)

Property	Description
	• Type: true | false • Value: self • Location: System Properties **Note:** If you want to enable only a guest experience for your customer service por can ignore this configuration.
User session time-out *glide.ui.session_timeout*	Set a user session timeout value for the *glide.ui.session_timeout* system pr to a value that is greater than or equal to your time-out. • Type: integer • Value: 30 • Location: System Properties **Note:** If you want to enable only a guest experience for your customer service por can ignore this configuration.
sn_customerservice.emails.customportal	Set the URL of your third-party customer supp so that the notification emails that your custor contain URLs that redirect them to the exact re record that they submitted. These notification emails are sent in scenario submitting a case, requesting a service, reque field technician, or booking a walk-up appoint • Type: string • Value: None • Location: System Properties For example, if your customer support portal i `https://www.example.com/support` then set the property value to `https://www.example.com/support`.
sn_csm_ec.proactive_inactivity_time	Set the inactive period (in seconds) to trigger help in Engagement Messenger. • Type: integer • Value: 2 • Location: System Properties
glide.knowman.serviceportal.use_numbered_url	The property contains a comma-separated lis service portal record sys_ids. For any portal re

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Engagement Messenger properties (continued)

Property	Description
	specified in this property, the article link will b displayed with the sysparm_number URL para instead of sys_kb_id. • Type: string • Value: None • Location: System Properties

Plugins installed

- Case Management Core (com.sn_customerservice)
- Integration - Multiple Provider Single Sign-On Installer (com.snc.integration.sso.multi.installer)

Components installed with Case lines and workflows

Several types of components are installed with the Case lines and workflows application, including tables and roles.

Tables

Case Lines and workflows tables

Table	Description
Case Line [sn_case_line]	The Case Line table stores case line item records that are created for parent cases. This table extends the Case table. The prefix for case line records is **CSL**.
Case Line Task [sn_case_line_task]	The Case Line Task table stores the tasks related to case line items. This table extends the Case Task table. The prefix for case line task records is **CSLTASK**.
Case Line Characteristic [sn_case_line_characteristic]	The Case Line Characteristic form displays details about the product offering included in a case line. The prefix for case line characteristic records is **CSLC**.
Case Line Entitlement [sn_case_line_entitlement]	The Case Line Entitlement table stores the entitlements that are associated with case line items.

Roles

The Case Lines and workflows application includes roles that provide access to case line item and case line characteristic records. It also updates some existing roles to provide this same access.

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Case lines and workflows roles

Role	Description	Includes roles
sn_case_line.characteristic_creator	This user can create case line characteristic records if they have access to the parent case line item record.	sn_case _characteristic_viewer
sn_case_line.characteristic_writer	This user can update case line characteristic records if they have access to the parent case line item record.	sn_case _characteristic_viewer
sn_case_line.characteristic_delete	This user can delete case line characteristic records if they have access to the parent case line item record.	sn_case _characteristic_viewer
sn_case_line.characteristic_viewer	This user can view case line characteristic records if they have access to the parent case line item record.	
sn_case_line.characteristic_reports_viewer	This user can view reports for the case line characteristic table if they have access to the parent case line item record.	
Case task agent [sn_customerservice.case_task_agent]	This is an existing role. The case task agent has read, write, and create access for case line tasks: • If the case task agent is the assigned user on the case task (assigned_to). • If the case task agent belongs to the same assignment group as the assigned user. The case task agent has read access to the following: • The parent order case and the case line items. • The case line characteristic if they have read access to the associated case line item. • Account and contact records for the parent order case.	• sn_customerservice.csm_workspace_user • sn_customerservice.customer_data_viewer • sn_customerservice.case_contributor_editor • sn_csm_case_types.service_definition_viewe

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Case lines and workflows roles (continued)

Role	Description	Includes roles
	The case task agent can update the work notes, comments, attachments, and watch list of the parent order case and the case line items.	
Customer service agent [sn_customerservice_agent]	This is an existing role. The customer service agent role has read, write, and update permissions for the following tables: • Case Line • Case Line Task • Case Line Characteristic	For more information, see Roles installed with Customer Service Management.
Customer contact sn_customerservice.customer	This is an existing role. The customer contact has read and write permissions in the Case Line Characteristic table	For more information, see Roles installed with Customer Service Management.

Properties

Case Lines and workflows properties

Property	Description
sn_customerservice.advanced_entitlements	Displays the Entitlements related list on the Case Line form. • True: the related list is visible. • False: the related list is hidden. This property applies to both CSM Configurable Workspace and Core UI.

Extension points in Customer Service Management

Use extension points to call custom scripts in the Customer Service Management application.

To access the available extension points, type **sys_extension_point.list** in the application navigator and press **Enter**. Click the desired extension point to view the record details.

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 the implementation that is executed.

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Customer Service Management extension points

Extension point	Description
`sn_customerservice.CSMService`	Defines the default value logic for case objects. Available with the Case Management Core (com.sn_customerservice) plugin.
`sn_customerservice.CSMCaseSync`	Use this extension point to customize the logic for parent-child case synchronization. This extension point can be used in one of two ways: • Define the conditions for parent case records that can be considered for synchronization to child cases. The default functionality is based on the **sn_customerservice.parent_child_case_sync** system property. Customers can add additional conditions using this extension point. • Customize the logic for parent-child case synchronization based on the state of the child case. By default, if the child case is in the **Resolved**, **Closed**, or **Cancelled** state, there is no sync from the parent case. This extension point is used by the `CSCaseSyncHelper` script include and is available with the Case Management Core (com.sn_customerservice) plugin. **Note:** In the base system, parent-child case synchronization is available only for the Case table (sn_customerservice_case). This feature must be configured for tables that extend the Case table.
`sn_majorissue_mgt.MajorCase`	Available with the Major Issue Management (com.sn_majorissue_mgt) plugin.
`sn_action_status.NeedsAttentionAccessUtil`	Enables search application to choose the user roles that can enable and disable the **Needs Attention** field on a case form. Available with the Customer Service Case Action Status plugin (com.snc.csm_action_status).
`sn_cs_sm.CSMChangeIntegrations`	Creates the logic for mapping the **Change Request** field on the case record.

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Customer Service Management extension points (continued)

Extension point	Description
	Available with the Customer Service with Service Management (com.sn_cs_sm) plugin.
`sn_cs_sm.CSMIncidentIntegrations`	Creates the logic for mapping the **Incident** field on the case record. Available with the Customer Service with Service Management (com.sn_cs_sm) plugin.
`sn_cs_sm.CSMProblemIntegrations`	Creates the logic for mapping the **Problem** field on the case record. Available with the Customer Service with Service Management (com.sn_cs_sm) plugin.
`sn_cs_sm_request.CSMRequestIntegrations`	Creates the logic for mapping the **Request** field on the case record. Available with the Customer Service with Request Management (com.sn_cs_sm_request) plugin.
global.CSMRelationshipServiceEP	Create CSM relationships with responsibilities. Available with the Case Management Core (com.sn_customerservice) plugin.
global.CSMContentAccessEP	Creates the logic to implement ACLs for create, read, update, and delete (CRUD) operations. Available with the Case Management Core (com.sn_customerservice) plugin.
AddressMgmtExtensionPoint	Enables users to customize the reference qualifiers of the location field in the Account Address table. Allows users to create an implementation of this extension point and override the "getAccountLocationsRefQual" function.

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

Email Interaction for CSM reference

Reference topics provide additional information about Email Interaction for CSM.

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Contact form for Email Interaction for CSM

The Contact form enables you to add the customer contact to the interaction record.

Contact form

Field	Description
First name	First name of the customer contact.
Last name	Last name of the customer contact.
Account	Account with which the customer contact is associated.
Title	Title of the customer contact.
Language	Preferred language of the customer for all communications and interactions.
Email	Email address of the customer contact.
Business phone	Business phone number of the customer contact.
Mobile phone	Mobile phone number of the customer contact.
Time zone	Time zone of the customer contact.
Notification	Enable notifications for the customer contact using the drop-down list.

Related topics

Create a customer contact

Email interaction sections

Use the sections on the email interaction page to view and update contact, interaction, and activity details.

Contact form

Field	Description
Name	Name of the customer contact.
Mobile phone	Mobile phone number of the customer contact.
Business phone	Business phone number of the customer contact.
Email	Email address of the customer contact.
Street	Name of the street.
City	Name of the city.
State/Province	Name of the state or province.
Account	Account with which the customer contact is associated.

Contact lookup

Field	Description
Lookup by name, phone, or email	Component for looking up a contact by name, phone number, or email address:

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Contact lookup (continued)

Field	Description
	• Search for a contact by name, phone number, or email address. Matching results appear in record cards as characters are entered in the search box. • Select a contact by selecting the matching record card. The record card replaces the lookup component. You can also create a record to add a guest user as a contact. For more information, see Create a customer contact.

Interaction form

Field	Description
Number	Automatically created interaction number.
Type	Type of customer interaction, which is **Email**.
Account	Name of the customer contact's company. This field is filled in automatically if the information is available in the contact record.
Contact	Name of the customer contact.
Consumer	Name of the consumer.
Guest Email	Email address of the guest user.
Verified	Option to mark the record as verified or validated.
State	Current state of the interaction. For more information, see Interaction states.
Assigned to	Name of the assigned user.
Consumer Profile	Information about the consumer.
Requester Organization	Organization requesting the omnichannel interactions.
Short description	Brief description of the customer issue.
Work notes	Information about the interaction and the work being done to resolve the customer issue.

Compose and Activity stream

Application	Description
Work notes	Internal notes documented for the agent's reference. These notes are visible only to agents and not to customer. When a work note is created, it appears in the Activity stream. For more information on work notes, see Compose a work note for internal use.
Email	Compose and send emails without leaving the record. For more information, see Compose an email response.

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Compose and Activity stream (continued)

Application	Description
	Note: The first email response that the agent sends is used to calculate the first response time duration, which is then populated in the **First response wait time** field.
Filters	Filters for emails, work notes, and field changes on the interaction.
Activity	View of email conversations between the agent and the customer. For more information, see Using the activity stream in an email interaction.
Summarize this interaction	Displays the AI-generated summary of the email interaction. Agents can refresh the summary, copy it, provide feedback, or save it to the interaction record. **Note:** AI-generated summaries may be inaccurate. Review the summary before using it. Check your entitlements to determine whether you have access to this feature.

Apps on contextual side panel

Application	Description
Attachments	Displays files and documents associated with the current record or interaction.
Recommended Actions	Displays the most relevant next steps based on the current context. For more information, see Using the Recommended Actions application.
Consumer Verify	Confirms the identity or details of the consumer involved in the interaction. For more information, see Lookup and verify.
Contact Verify	Confirms the identity or details of the contact involved in the interaction. For more information, see Lookup and verify.
Response Template	Displays the response template required to respond to the customer. For more information, see Compose emails and work notes using response templates.
Related Lists	Displays associated items such as emails, tasks, knowledge articles, and open cases linked to the current interaction. • Related Email Interactions: Lists the email interactions linked to the current interaction. • Emails: Displays all the emails associated with the interaction. • Draft Emails: Find emails that are currently being drafted and not yet sent. • Related Tasks: Lists all cases created out of an interaction.

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Apps on contextual side panel (continued)

Application	Description
	• Related Knowledge Articles: Displays relevant knowledge articles that can provide further information related to the interaction. • Open Cases: Shows any open cases that are related to the consumer or contact.
Customer History	Displays customer, consumer, or account history information, depending on the customer information provided on the interaction record. This tab includes a search field, filter, and date range selector that agents can use to find specific information in the history. For more information on the customer history, see Customer History component features.

AI summary card controls

Control	Description
Summarize	Generates an AI summary of the email interaction using ServiceNow Otto. The summary appears in the Interaction Summary card and may include Issue, Key Actions Taken, and Next Steps depending on the email content. **Note:** AI-generated summaries may be inaccurate. Review the summary before using it. Check your entitlements to determine whether you have access to this feature. For more information, see AI summarization of email interactions and Summarize an email interaction
View less or View more	Collapses or expands the AI summary card.
Copy icon	Copies the summary content to the clipboard.
Helpful or Not helpful icons	Submits feedback on the quality of the AI-generated summary.
Refresh icon	Regenerates the summary when email interaction data has changed since the original summary was created.
Information icon	Displays the AI disclaimer: `AI summarized this using the record details. Check it for accuracy.`

UI Actions

Application	Description
Create Case	Creates a case from the interaction.
Close	Closes the email interaction.
Save	Saves the updates made in the email interaction.

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UI Actions (continued)

Application	Description
Associate Record	Associates existing cases with the current interaction.
Assign to me	Assigns the interaction to the current agent. **Note:** Assign to me is visible only in interactions in the New state and when the Assigned to field is empty.
Summarize	Generates an AI summary of the email interaction on demand. Check your entitlements to determine whether you have access to this feature. For more information, see AI summarization of email interactions.

Related topics

Using email interaction page

AI summarization of email interactions

Wrap-up codes for email interactions

Default wrap-up codes and configuration settings available for email interactions in Customer Service Management.

Default wrap-up codes

Wrap-up code	Description
Issue resolved	Interaction closed after the reported issue was resolved.
Task Created	Interaction closed after a follow-up task or case was created for further action.
Closed due to customer inactivity	Interaction closed as the customer did not respond within the defined follow-up period.

Wrap-up configuration settings

Setting	Description	Default
Table	The interaction table for which wrap-up codes apply.	Interaction
Type	The interaction type.	Email
Wrap-up duration	Timeout period for agents to submit a wrap-up code after closing an interaction.	2 minutes
Default wrap-up code	The wrap-up code applied automatically if the agent does not submit within the timeout.	Issue resolved

Related topics

Configure wrap-up codes for email interactions

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Email reply linking scenarios for closed interactions

Describes how Email Interaction links a customer email reply when the reply references a closed interaction. The system evaluates conditions in the order listed.

Email reply linking scenarios

Scenario	Condition	System action
One open interaction	A single open interaction is related to the closed interaction.	Links the email to the open interaction. No new interaction is created.
One open case	A single open case is associated with the closed interaction.	Links the email to the open case. No new interaction or case is created.
Multiple cases, one open	Multiple cases are linked to the closed interaction; only one is open.	Links the email to the open case. Closed cases remain unchanged.
Multiple open cases	Multiple open cases are linked to the closed interaction.	The AI skill retrieves each case's short description, latest five emails, and comments, and applies keyword matching. The email is linked to the case with the highest confidence score at or higher than 85%.
Multiple open cases, low confidence	Multiple open cases exist; the AI skill returns a confidence score lower than 85% for all cases, or the skill is inactive.	Email is linked to the most recently opened case as a fallback.
No open records	No open interactions or cases are associated with the closed interaction.	A new interaction is created. A reference to the original closed interaction is stored on the new interaction.

Linking behavior

- The original closed interaction is not reopened, regardless of scenario.
- No new interaction or case is created when a valid open record is identified.
- Extended case types are included in the evaluation and standard cases.

Feature context parameters supported in Engagement Messenger

Features for contextual launch capability enable you to set the default launch screen in Engagement Messenger.

Embed code and parameters for a feature context

Feature	Embed code	Feature parameter description
CHAT	`{ feature: "CHAT", params: {`	**<sys_id>** Identifies the Virtual Agent

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Embed code and parameters for a feature context (continued)

Feature	Embed code	Feature parameter description
	"topic_id": "<sys_id>", "language": "<language_name>", "sysparm_<param_name>": "<param_value>" } }	topic to be included in the chat. **<language_name>** Default chat language. For example, for French, specify `fr` **<param_name>:<param_value>** Any additional parameters to be passed to the Virtual Agent topic. The name of the parameter should start with `sysparm`. For example, `sys_param_product_name`.
WORK_ORDER	{ feature: "WORK_ORDER", params: { "table": "wm_order", "sys_id": "<sys_id>" } }	**<sys_id>** System identifier (sys_id) of a work order.
CASE	{ feature: "CASE", params: { "table": "sn_customerservice_case", "sys_id": "<sys_id>" } }	**<sys_id>** System identifier (sys_id) of a case.
NEW_CASE	{ feature: "NEW_CASE", params: {	None

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Embed code and parameters for a feature context (continued)

Feature	Embed code	Feature parameter description
	`  }` `}`	

CASE_LIST	`{`
	`  feature:`
	`  "CASE_LIST",`
	`  params: {`
	`  }`
	`}`
		None

VIEW_ARTICLE	`{`
	`  feature:`
	`  "VIEW_ARTICLE",`
	`  params: {`
	`  "sys_kb_id":`
	`  "<sys_id>"`
	`  }`
	`}`
		<sys_id>
		System identifier (sys_id) of a knowledge article.

SEARCH	`{`
	`  feature: "SEARCH",`
	`  params: {`
	`  "q":`
	`  "<search_term>"`
	`  }`
	`}`
		<search_term>
		Term to be searched for in a search results query.

CASE_SEARCH	`{`
	`  feature:`
	`  "CASE_SEARCH",`
	`  params: {`
	`  "q":`
	`  "<search_term>"`
	`  }`
	`}`
		<search_term>
		Term to be searched for in a case results query.

CATALOG_ITEM	`{`
	`  feature:`
	`  "CATALOG_ITEM",`
	`  params: {`
	`  "sys_id":`
	`  "<sys_id>"`
	`  }`
	`}`
		<sys_id>
		System identifier (sys_id) of a catalog item.

NEW_APPOINTMENT	`{`
	`  feature:`
	`  "NEW_APPOINTMENT",`
		None

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Embed code and parameters for a feature context (continued)

Feature	Embed code	Feature parameter description
	`params: { }` `}`	
NEW_WORK_ORDER	`{ feature: "NEW_WORK_ORDER", params: { } }`	None
HOME	`{ feature: "HOME", params: { } }`	None

Related topics

Launch a feature in Engagement Messenger using custom code

Engagement Messenger translation tables

Engagement Messenger uses the [sys_translated_text] and [sys_ui_message] tables to store translated text.

Each translated field on every row has one or more entries in the this table, one per language for which ServiceNow provides a translation.

Translation tables used by Engagement Messenger

Table	Description
Translated Text [sys_translated_text]	Stores translations for configurable fields such as User Greeting and Search Message. These fields are configured in Engagement Messenger module configuration and have the field type `translated_text`. The main fields of this table are: • **Document**: Internal identifier of the feature instance record this translation applies to. • **Field name**: Title or subtitle field from feature instance record. • **Language**: Language the text is translated into. • **Table Name**: Name of the feature instance. • **Value**: Translated text that the user sees. For details about translating text content into different languages, see Translated text table and Translating text fields.

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Translation tables used by Engagement Messenger (continued)

Table	Description
Message [sys_ui_message]	Stores translations for static messages in Engagement Messenger. For more information about the Message table, see Message table.

Note: For information about Virtual Agent chat translation, see Virtual Agent translation tables

Customer Contracts and Entitlements reference

Reference topics provide additional information on service contract life cycle and forms available within the Customer Contracts and Entitlements application.

What to explore next

To learn more about configuring and using Customer Contracts and Entitlements, see:

- Configure Customer Contracts and Entitlements
- Using Customer Contracts and Entitlements

Customer contract life cycle

A customer contract goes through the various states in each phase of its life cycle.

In each state, a customer contract is enabled to perform certain actions as mentioned in the following table.

customer contract life cycle, related states, and actions that it can perform

Life-cycle	State	Action
A customer contract is generated.	Draft	• The start and end dates of the customer contract can be modified such that the child records' dates are within the date range. • The related contract lines and entitlements can be added, removed, or modified. • The sold product/install base item covered can be added or removed.
Customer contract gets activated on the date of activation.	Active	• Modifications to the customer contract can be done manually, via integration and via Sales Customer Relationship Management workflow. • The start date can't be modified. • The end date can be extended and should be greater than the current date. • customer contract line items can be added. • The sold product/install base item covered can be modified.

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customer contract life cycle, related states, and actions that it can perform (continued)

Life-cycle	State	Action
Customer contract is deactivated on the date of expiration.	Expired	No action.
Customer contract is canceled.	Canceled	No action.

The customer contract line items and entitlements also perform similar actions in the respective states.

When a parent entity moves to the Expired state, the child entities inherit the same state. For example, when a customer contract expires, the related contract lines and entitlements also expire.

However, the state change of a child entity doesn't affect it parent entity.

The sold product or install base item referenced either in the contract line or an entitlement must be in the same state as the entity where it's referenced.

Suspended state

When a sold product is suspended, the related customer contract lines and entitlements, in the Draft or Active states, move to the Suspended state as well.

A suspended customer contract line or entitlement is paused for any activity, except the following:

- Editing the field values.
- Creating records in the corresponding related lists.

On resuming the sold product, the related customer contract line item or entitlement acquires the state depending on its start and end dates. For example, a resumed entitlement that has its start date in the past and its end date in the future, acquires the Active state.

Exceptionally, when a contract line or entitlement in the Suspended state has reached its end date, it moves to the Expired state automatically.

Date validations

A customer contract line associated with a customer contract must be created within the customer contract's start and end dates. Any modification to the dates of customer contract lines must comply with the date range of the parent service contract.

Customer contract form

The Customer Contracts and Entitlements application uses the Customer contract form to create customer contracts.

customer Contract form

Field	Description
Name	The name of the customer contract.

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customer Contract form (continued)

Field	Description
Number	The internal unique identification number that is generated when the customer contract is created. This number isn't editable.
Contract Reference	The externally assigned identification number assigned to the customer contract.
Account	The name of the account associated with the customer contract. **Note:** • A customer contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Account form. For more information on the fields in the Account form, see Account form.
Consumer	The name of the consumer associated with the contract. **Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record.
State	The current state of the customer contract: • Draft • Active • Expired • Canceled • Suspended
Start date	The activation date of the customer contract.
End date	The date when the customer contract ends.
Renewal root	A customer contract can be renewed multiple times. Renewal root refers the customer contract reference of the first or base customer contract.
Renewed from	A customer contract can be renewed multiple times. Renewed from field refers to the previous customer contract that was renewed.

Customer contract line form

You can create customer contract lines in the Customer Contracts and Entitlements application by using the Customer Contract Line form.

Customer Contract Line form

Field	Description
Name	The name of the customer contract line.

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Customer Contract Line form (continued)

Field	Description
Contract	The internal unique identification number that is generated when the customer contract is created. This number isn't editable.
Parent contract line	The internal unique identification number of the parent customer contract line that is associated with the child customer contract line.
Account	The name of the account associated with this customer contract. **Note:** • A customer contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form.
Location	The customer or installation location.
Product specification	The product specification that is mapped to the sold product.
Number	The internal unique identification number of the customer contract line that is generated when it is created. This number isn't editable.
Consumer	The name of the consumer associated with this contract. **Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record.
State	The current state of the contract line: • Draft • Active • Expired • Canceled • Suspended **Note:** • The state of the customer contract line is inherited from its parent customer contract. • Suspended state is only applicable when the contract line item is created via the Sales Customer Relationship Management workflow.
Start date	The date of activation of the customer contract line.
End date	The date when the customer contract line expires.
Product	The product model that is mapped to the product offering for the sold product.
Product offer	The product offering that is mapped to the sold product.

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Customer Contract Line form (continued)

Field	Description
Sold product	The name of the sold product that is added to the contract line. **Note:** • When the customer contract line item is created via the Sales Customer Relationship Management workflow, this field displays the sold product name from which the contract line is generated. • When customer contract lines are created via integration, the field becomes invalid.
Renewal root	A customer contract line can be renewed multiple times. Renewal root refers the customer contract line reference of the first or base customer contract line.
Renewed from	A customer contract line can be renewed multiple times. Renewed from field refers to the previous customer contract line that was renewed.

You can see the pricing information on a contract line for subscription contracts that helps you in reviewing your contract information.

Subscription & Pricing

Term (Months)	Validity period of having access to the service or product.
Subscription Start Date	Start date of the contract subscription.
Subscription End Date	End date of the contract subscription.
Price List	Price list associated for servicing the product.
Unit net price	The price for each unit within the product offering. The net price of a single unit of the sold product.
Pricing method	The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity.
Periodicity	The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually. This field becomes valid only when the method in the **Pricing method** field is a recurring payment.
One Time Price	Represents one-time charges to be paid for the product or service.
Monthly Recurring Price	Represents the price that the customer is supposed to pay monthly during usage of the product.

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Subscription & Pricing (continued)

Annual Recurring Price	Represents the price to pay annually during usage of the product.
Cumulative one-time price	Represents one-time charges to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Represents monthly price for the parent line and all the child line items
Cumulative annual recurring price	Represents annual price for the parent line and all the child line items.
Cumulative net price	Represents the total price of the contract line by calculating the roll-up amount of all root lines.

Note: When a customer contract line item is created manually, the **Pricing method**, **Unit net price**, and **Periodicity** fields are invalid. They're only applicable when the contract line is created by the Sales Customer Relationship Management workflow or by integration. In that case, these fields are auto-populated with the details from the related sold product. The start and end dates of a child customer contract line must be in between the start and end date of the associated parent customer contract line.

Entitlement form

The Entitlement form can be used to create entitlements in Customer Contracts and Entitlements.

Entitlement form

Field	Description
Name	The name of the entitlement.
Product	The product associated with the entitlement.
Contract	The internal unique identification number that is generated when the customer contract is created. This number isn't editable.
Account	The name of the account associated with this contract. **Note:** • A customer contract can be associated with either an account or a consumer. • An account can be created if no account is found by selecting **New** on the Accounts form. For more information on the fields in the Account form, see Account form.
Location	The service or installation location.
Product specification	The product specification that is mapped to the sold product. **Note:** Configure this field manually on the entitlement form using form layout.

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Entitlement form (continued)

Field	Description
Consumer	The name of the consumer associated with this contract. **Note:** If no consumer record is found, you can create a consumer and add it to the customer contract. For more information, see Create a consumer record.
Customer contract line	The name of the related customer contract line.
State	The current state of the entitlement: • Draft • Active • Expired • Canceled • Suspended **Note:** The state of the entitlement is inherited from its parent contract line.
Start date	The entitlement activation date.
End date	The date when the entitlement ends.
Sold entitlement	The name of the sold product that is added to the entitlement. **Note:** • If the entitlement is created manually, this field remains read-only. • The field must have the same state as its related entitlement. • The field becomes invalid when entitlements are created via integration.
Product offer	The product offering that is mapped to the order line item.
Renewal root	An entitlement can be renewed multiple times. Renewal root refers the entitlement reference of the first or base service entitlement.
Renewed from	An entitlement can be renewed multiple times. Renewed from field refers to the previous entitlement that was renewed.

You can see the pricing information on an entitlement for subscription contracts that helps you in reviewing your contract information.

Subscription & Pricing

Term (Months)	Validity period of having access to the service or product.
Subscription Start Date	Start date of the contract subscription.
Subscription End Date	End date of the contract subscription.

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Subscription & Pricing (continued)

Price List	Price list associated for servicing the product.
Unit net price	The price for each unit within the product offering. The net price of a single unit of the sold product.
Pricing method	The pricing method for the selected sold product. It can be one-time or recurring. One-time pricing charges one fee for the product offering. Recurring pricing lets you set the pricing periodicity.
Periodicity	The frequency of the pricing method. It can be monthly, quarterly, semiannually, or annually. This field becomes valid only when the method in the **Pricing method** field is a recurring payment.
One Time Price	Represents one-time charges to be paid for the product or service.
Monthly Recurring Price	Represents the price that the customer is supposed to pay monthly during usage of the product.
Annual Recurring Price	Represents the price to pay annually during usage of the product.
Cumulative one-time price	Represents one-time charges to be paid for the parent line and all the child line items.
Cumulative monthly recurring price	Represents monthly price for the parent line and all the child line items
Cumulative annual recurring price	Represents annual price for the parent line and all the child line items.
Cumulative net price	Represents the total price of the contract line by calculating the roll-up amount of all root lines.

Sold Product Covered form

The Customer Contracts and Entitlements application uses the Sold Product Covered form to add sold products or install base items that are covered to the Customer Contracts and Entitlements entities.

For information about adding sold products or install base items that are covered, see Add a sold product or install base item to a customer contract.

Sold Product Covered form

Field	Description
Contract	The reference number of the associated customer contract.

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Sold Product Covered form (continued)

Field	Description
Sold Product	The products that are sold to a customer. **Note:** • The list of sold products is filtered based on the account related to the contract or entitlement. • If a product is added, the **Install Base Items** field is automatically removed. • If a product isn't listed, you can add it. Select **New** in the Sold Products window. For more information, see Create a sold product.
Install Base Item	The related install base item. **Note:** • The list of sold products is filtered based on the account related to the contract or entitlement. • If an install base item is added, the **Sold Product** field is automatically removed. • If an install base item isn't listed, you can add it. Select **New** in the Install Base Item window. For more information, see Create an install base item.
Customer contract line	The associated customer contract line reference.
Entitlement	The associated entitlement reference.
Date added	The date that the product is added to the entity.
Date removed	The date until which the product is active on the entity.

Note: The activation time period for the sold product or install base item covered must comply with the related entity's activation period.

Roles required for B2B2C data models

With the B2B2C model, organizations across industries can easily configure multi-level customer relationships and support business customers who, in turn, support their end consumers.

Customer data models for B2B2C require different roles, depending on the tasks you perform.

Roles required

Role	Tasks
sn_customerservice_agent (customer service agent)	Create a case for an account consumer from platform or Customer Service Management

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Roles required (continued)

Role	Tasks
	(CSM) workspaces to track issues. See Create cases for an account consumer.
awa_agent and sn_customerservice_agent	Accept a chat request on CSM workspaces and create a case from the chat interaction.
sn_customerservice_manager (customer service manager)	Associate consumers to an account to identify the end consumers who are using products or services. Associate install base items/sold products with account consumers to track the end consumer issues.
sn_acct_consumer.consumer (account consumer)	View sold products/install bases items to track the instances provisioned for your account and the products or services sold to your account. Create a case for install base items or sold products issues from the CSM portal. You get email notifications when a case is created, commented, resolved, or closed. See Create a case from the CSM portal.
sn_customerservice.customer (account contact)	View sold products/install bases items to track end consumer issues. SeeView install base information from the Customer Service Portal and View products information from the Customer Service Portal. Create a case for an account consumer to track consumer issues. See Create cases for an account consumer.

Roles for Outsourced Customer Service

Outsourced Service Providers (OSPs) are organizations that an enterprise engages to provide customer service to external customers. The OSPs manage cases for customers associated to their organization.

There are various roles required based on the tasks you perform.

Roles required

Role	Description
sn_csm_ocs.ext_manager (external OSP manager)	Onboard agents from service providers they belong to along with managing case assignments.
sn_csm_ocs.ext_agent (external OSP agent)	Agents can fulfill the cases belonging to the service provider organization they belong to.

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Roles required (continued)

Role	Description
sn_csm_ocs.manager (internal OSP manager)	Manages and monitors all the activities performed by OSPs. The manager can also access the OSP dashboards and act as an internal point of contact for the organization.

Note: OSP agents and managers can perform their designated tasks using UI16 interfaces, as workspaces aren't supported at the moment.

Related topics

Set up Outsourced Customer Service

Outsourced Customer Service

Outsourced Service Provider dashboard

Customer Service Management roles

The Customer Service Management (CSM) application uses roles to provide access to information, identify internal and external users, maintain data security, and establish different types of relationships between users. CSM is installed with certain basic and primary roles.

Customer Service Management provides several primary roles that support the following business models:

- Business-to-business (B2B): With this business model, you can support accounts and contacts. Additionally, you can create relationships and account teams to support your customers.
- Business-to-consumer (B2C): With this business model, you can support individual consumers.

These roles ensure access to data while maintaining data security for different types of business relationships.

Besides the Base and Primary roles (that are based on the Base roles), there are Explicit roles as well. You may have business requirements that can vary how you use the roles. The Explicit roles in CSM feature lets you assign both internal and external roles to external users. It is important to regularly review user role assignments to ensure that they are set according to your business requirements.

For more information about reviewing and updating user role assignments, see:

- KB0829930
- Fix external user role assignments

To learn more about managing Customer Service Management roles, see Components installed with CSM workspaces and Components installed with additional plugins for Customer Service Management.

Service management agent [sn_esm_agent]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

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Contains Roles

List of roles contained within the role.

- *assignment_workbench*
- *wm_read*
- *cmdb_read*
- *agent_schedule_user*
- *interaction_agent*
- *sn_publications_recipients_list_user*

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management partner [sn_esm_partner]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

sn_esm_user

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management user admin [sn_esm_user_admin]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

sn_esm_user

Groups

List of groups this role is assigned to by default.

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All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management admin [sn_esm_admin]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management user [sn_esm_user]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

- *snc_external*
- *sn_apptmnt_booking.appointment_booking_user*

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Service management partner admin [sn_esm_partner_admin]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

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- *sn_esm_user_admin*
- *sn_esm_admin*

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Role for REST APIs related to CSM web services [csm_ws_integration]

Use this Base role to access all features available within Customer Service Management. This role is available and installed with the Customer Service Base Entities plugin.

Contains Roles

List of roles contained within the role.

snc_internal

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Customer service agent [sn_customerservice_agent]

Use this role to create cases, view and edit cases, and work with customers and subject matter experts to resolve cases. This role helps agents assist customers and partners with questions, issues, and problems.

Contains Roles

List of roles contained within the role.

- *knowledge*
- *chat_admin*
- *sn_customerservice.deescalation_requester*
- *timecard_user*
- *template_editor*
- *sn_esm_agent*

Note: This role contains the cmdb_read role.

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- *sn_shn.editor*
- *domain_expand_scope*

Groups

List of groups this role is assigned to by default.

Customer service agents.

Special considerations

Note: A customer service agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.

For more information see Roles installed with Customer Service Management.

Customer service manager [sn_customerservice_manager]

Use this role with the additional responsibility for managing agents or agent groups and overriding agent actions. A customer service agent can also use this role with the additional capability of this role.

Contains Roles

List of roles contained within the role.

- *sn_customerservice_agent*
- *timecard_manager*
- *timecard_approver*
- *skill_admin*
- *sn_app_cs_social_social_profile_user*
- *sam*
- *sn_customerservice.consumer_agent*
- *asset*
- *sn_shn.admin*
- *sn_publications.approver*
- *contract_manager*
- *sn_app_cs_social_log_user*
- *awa_manager*
- *sn_majorissue_mgt.major_issue_manager*
- *email_client_quick_message_author*
- *workspace_admin*
- *skill_model_user*
- *sn_templated_snip.template_snippet_writer*
- *approver_user*

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> **Note:** For customers upgrading to Xanadu, the approver_user role replaces the approval_admin role. Users with the customer service manager role can approve the approval requests that are assigned to them.

- *notify_view*

> **Note:** The notify_view role is added to the sn_customerservice_manager role only when the Chat Zoom Connector application is installed.

Groups

List of groups this role is assigned to by default.

Customer service managers, and Customer service agents with the additional responsibility for managing agents or agent groups and overriding agent actions.

Special considerations

For more information see Roles installed with Customer Service Management.

Consumer service agent [sn_customerservice.consumer_agent]

Use this role to create cases, view and edit cases, and work with customers and subject matter experts to resolve cases. This role helps agents assist consumers with questions, issues, and problems.

Contains Roles

List of roles contained within the role.

- *sn_esm_agent*
- *chat_admin*
- *sn_shn.editor*
- *template_editor*
- *knowledge*

Groups

List of groups this role is assigned to by default.

All consumer service agents.

Special considerations

> **Note:** A consumer service agent typically supports a specific set of products across one or more communication channels. An agent can belong to one or more agent groups.

For more information see Roles installed with Customer Service Management.

Customer [sn_customerservice.customer]

Assign this role to customers for researching questions, issues, or problems. Customers can create cases, and view and edit existing cases. They can also view a list of assets belonging to their accounts.

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Contains Roles

List of roles contained within the role.

- *sn_esm_user*
- *snc_external*

Groups

List of groups this role is assigned to by default.

All users with customer roles and access to a list of assets belonging to their accounts.

Special considerations

For more information see Roles installed with Customer Service Management.

Customer administrator [sn_customerservice.customer_admin]

Use this Administrator role for a customer account. This user has access to data within the account.

Contains Roles

List of roles contained within the role.

- *sn_customerservice.customer*
- *sn_esm_user_admin*

Groups

List of groups this role is assigned to by default.

All users with an administrator role for a customer account.

Special considerations

For more information see Roles installed with Customer Service Management.

Customer case manager [sn_customerservice.customer_case_manager]

Assign this Customer role for managing the cases in an account and any related child accounts.

Contains Roles

List of roles contained within the role.

sn_customerservice.customer

Groups

List of groups this role is assigned to by default.

All users with a case manager role for a customer account.

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Special considerations

The customer case manager role includes the privileges of the customer role and adds the following privileges:

- Create a case on behalf of another contact in the account.
- View a list of cases belonging to the account.
- Edit cases belonging to the account.

Note: The customer case manager role is not automatically added to the *sn_customerservice.contact_role_assignment* system property. To expose this role to customer and partner administrators, navigate to **Customer Service** > **Administration** > **Properties** and add it to this property.

For more information see Roles installed with Customer Service Management.

Partner [sn_customerservice.partner]

Assign this role to create a case for the partner's own account or on behalf of a customer account.

Contains Roles

List of roles contained within the role.

- *sn_customerservice.customer*
- *sn_esm_partner*

Groups

List of groups this role is assigned to by default.

All users serving customer accounts.

Special considerations

A partner can view and edit all of the cases they have created:

- For their own account.
- On behalf of customer accounts they are related to.

Note: If you are establishing a new relationship between a partner and a customer, the partner or partner admin does not have access to historic cases created for the customer. This is because the historic cases do not have the Partner or Partner Contact fields populated on the Case form.

For more information see Roles installed with Customer Service Management.

Partner administrator [sn_customerservice.partner_admin]

Assign this administrator role to a user with a partner account.

Contains Roles

List of roles contained within the role.

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- *sn_customerservice.partner*
- *sn_customerservice.customer_admin*
- *sn_esm_partner_admin*

Groups

List of groups this role is assigned to by default.

All users with the admin role for a partner account.

Special considerations

The partner administrator can do the following:

- Access the data within the partner account.
- Access the data created by the contacts in their company in the customer account.
- Manage users for the partner account and for customer accounts.
- View all of the cases created by a partner.

For more information see Roles installed with Customer Service Management.

Consumer [sn_customerservice.consumersn_customerservice.consumer]

Assign this Consumer role to users for researching questions, issues, or problems.

Contains Roles

List of roles contained within the role.

- *sn_esm_user*
- *snc_external*

Groups

List of groups this role is assigned to by default.

All users with the assigned Consumer role.

Special considerations

Consumers can create cases and view and edit existing cases for products that they have purchased. They can also view a list of their products. For more information see Roles installed with Customer Service Management.

Customer Service Case Admin [sn_customerservice.case_admin]

Can create, view, update and delete records in the following table: Customer Service Case [sn_customerservice_case]

Contains Roles

List of roles contained within the role.

None.

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Note: Limited fields accessibility. No full privilege.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Recipients list user [sn_publications_recipients_list_user]

The recipients list user can create and view recipient lists.

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

All users.

Special considerations

For more information see Roles installed with Customer Service Management.

Case Type Configuration Admin [sn_csm_case_type.config_admin]

Can create, view, update and delete records in the following table: Case type [sn_case_type]

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Case Digest Admin [sn_csm_case_digest.admin]

Can delete records in the following table: Case Digest [sn_csm_case_digest_task]. Can create, view, update and delete records in the following table: Case Digest Configuration [sn_csm_case_digest_config].

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Contains Roles

List of roles contained within the role.

sn_csm_doctemplate.admin.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Doc Template Admin [sn_csm_doctemplate.admin]

Can read records in the following table: Case Action Summary [sn_csm_case_digest_cas], Post Case Review [sn_csm_case_digest_pcr]. Can create, view, update and delete records in the following table: CS Document Template [sn_csm_doctemplate_template]

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Project Portfolio Management Admin [sn_csm_ppm.admin]

Can read records in the following table: Customer Project Task [customer_project_task]

Contains Roles

List of roles contained within the role.

None.

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

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Project Portfolio Management Task Writer

Can read records in the Customer Project [customer_project] table, and read and write records in the Customer Project Task [customer_project_task] table (without delete).

Contains Roles

Roles contained within the role.

Project Portfolio Management Viewer [sn_csm_ppm.viewer].

Task Plan Admin [sn_task_plan.admin]

Can create, view, update and delete records in the following table: Task Plan Category [sn_task_plan_category], Task Plan Template Configuration [sn_task_plan_config], Task Plan Configuration Category [sn_task_plan_config_category], Task Plan Template [sn_task_plan_template], Task Plan Template Access [sn_task_plan_template_access], Task Plan Template Category [sn_task_plan_template_category], Task Plan Template Execution [sn_task_plan_template_execution], Template Item [sn_task_plan_template_item], Template Item Condition [sn_task_plan_template_item_condition], Template Item Configuration [sn_task_plan_template_item_config]

Contains Roles

List of roles contained within the role.

- *sn_task_plan.creator*
- *sn_task_plan.delete*
- *sn_task_plan.report_viewer*
- *sn_task_plan.navigation_menu*

Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

UIB Dynamic Related Records Admin [sn_uib_dyn_rel_rec.admin]

Can create, view, update and delete records in the following tables: Related Record Definition [sn_related_record_definition], Related Record Context [sn_related_record_context], Context Related Record Definition [sn_m2m_context_related_record_defn]

Contains Roles

List of roles contained within the role.

None.

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Groups

List of groups this role is assigned to by default.

None.

Special considerations

None.

Data classification for Install Base Management

Enable customers to automatically classify sensitive data for their workflows. After data is classified, users can view the type of classification associated to different fields, whether internal, restricted, confidential, or public.

List of sensitive fields for sold products and install base

Table	Field	Plugin from which the field is coming	Classification
Sold product table (sn_install_base_sold_product)	offering_type	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	relationship_type	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	unit_of_measurement	Product Catalog Management core (sn_prd_pm)	Confidential
Sold product table (sn_install_base_sold_product)	product_specification	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	periodicity	Product Catalog Management core (sn_prd_pm)	Confidential
Sold product table (sn_install_base_sold_product)	pricing method	Product Catalog Management core (sn_prd_pm)	Confidential
Sold product table (sn_install_base_sold_product)	prd_offering	Product Catalog Management core (sn_prd_pm)	Internal
Sold product table (sn_install_base_sold_product)	service_offering	Customer Service with Service Portfolio Management (snc.csm_spm)	Internal
Sold product table (sn_install_base_sold_product)	household	CRM Household Entities (com.snc.household)	Confidential
Sold product table (sn_install_base_sold_product)	service_organization	Service Organization (com.snc.service_organization)	Confidential

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List of sensitive fields for sold products and install base (continued)

Table	Field	Plugin from which the field is coming	Classification
Sold product table (sn_install_base_sold_product)	provider_service_organization	Service Organization (com.snc.service_organization)	Confidential
Install base table (sn_install_base_item)	household	CRM Household Entities (com.snc.household)	Confidential
Install base table (sn_install_base_item)	service_context	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Internal
Install base table (sn_install_base_item)	health_status_last_updated	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Internal
Install base table (sn_install_base_item)	service_context	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Internal
Install base table (sn_install_base_item)	health_status	Proactive Customer Service Operations with Event Management (snc.proactive_cs_itom)	Confidential
Install base table (sn_install_base_item)	service_organization	Service Organization (com.snc.service_organization)	Confidential

Service Model Foundation renamed Entities

The renamed entities dispaly several Service Model Foundation entities that are renamed, including the previous and current names.

Renamed entities

Table name	Previous label	New label	Effective from
sn_customer_service_organization	Service Organization	Organization Core	Service Organization 2.4
sn_csm_business_location	Business Location	Business Organization	Business Location 5.2
sn_csm_business_location_internal	Internal Business Location (IBL)	Internal Organization	Business Location 5.2

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Renamed entities (continued)

Table name	Previous label	New label	Effective from
sn_csm_business_location_external	External Business Location (EBL)	External Organization	Business Location 5.2
sn_outsourced_service_provider	Outsourced Service Provider	No change	-
sn_csm_service_organization_external_staff	Service Organization External Staff	External Organization Staff	Service Organization 2.4
	Service Organization Member	Organization Member	Service Organization 2.4
service_organizations_offering_service	Service Organizations offering Service	Organizations offering Service	Service Organization 2.4
service_organization_criteria	Service Organization Criteria	Organization Criteria	Service Organization 2.4
service_organization_customer_criteria	Service Organization Customer Criteria	Organization Customer Criteria	Service Organization 2.4
sn_csm_svc_org_member_responsibility	Service Organization Member Responsibility	Organization Member Responsibility	Service Organization 2.4
sn_service_org.service_org_assignment_group	Service Organization Assignment Group	Organization Assignment Group	Service Organization 2.4

Field label renaming

The following foreign key field labels have been updated across impacted entities.

Note: The entity name changes are effective from v2.4 of the Service Organization store app.

Table name	Field name	Previous label	New label
Service Organization	service_organization_parent	Parent Service Organization	Parent Organization
Service Organization External Staff	service_organization	Service Organization	Organization
Service Organization Member	service_organization	Service Organization	Organization

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Table name	Field name	Previous label	New label
Case	requesting_service_organization	Requesting Service Organization	Requestor Organization
Case	service_organization	Service Organization	Provider Organization
Interaction	requesting_service_organization	Requesting Service Organization	Requestor Organization
Sold Product	provider_service_organization	Provider Service Organization	Seller Organization
Sold Product	service_organization	Service Organization	Buyer Organization
Install Base Item	service_organization	Service Organization	Buyer Organization
Install Base Item	provider_service_organization	Provider Service Organization	Provider Organization
Install Base Related Party	service_organization	Service Organization	Organization
Work Order	service_organization	Service Organization	Requestor Organization
Work Order	provider_service_organization	Provider Service Organization	Provider Organization
Customer Project	service_organization	Service Organization	Organization
Retail Organization	service_organization	Service Organization	Business Organization
Customer Service Organization	service_organization_path	Service Organization Path	Organization Path
Customer Service Organization	service_organization_code	Service Organization Code	Organization Code
Customer Service Organization	service_organization_served	Service organizations served	Organizations served
Responsibility Definition	service_organization	Service Organization	Business Organization
Responsibility Access Config	service_organization	Service Organization	Business Organization

Workforce Optimization for Customer Service reference

Reference information for Workforce Optimization for Customer Service, including manager workspace landing page KPIs, data visualizations, and role requirements.

Workforce Optimization for Customer Service manager workspace landing page

Monitor your teams' work and organizational performance using Workforce Optimization for Customer Service.

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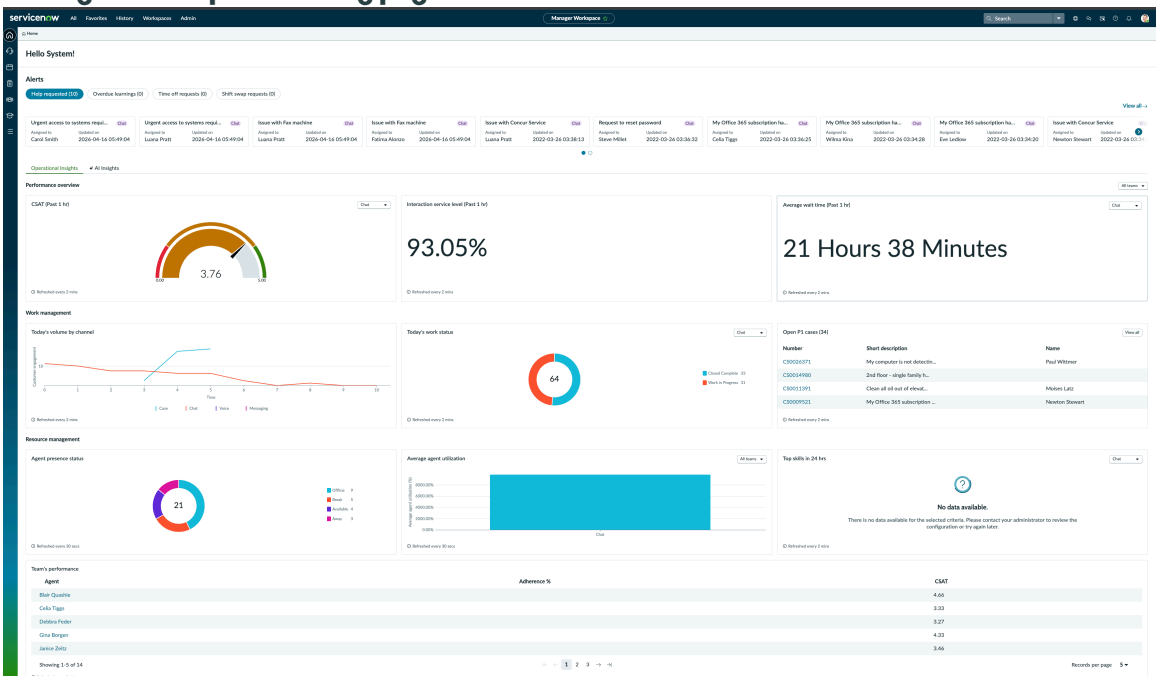
Home tab

Manager Workspace landing page



End user and roles

User goals and roles

End user and goal	Required role
As a workspace manager, you can: • Act on alerts requesting help, overdue training tasks, and time-off requests from the team. • Review customer satisfaction (CSAT) metrics to evaluate the performance of your team. • Monitor ongoing cases and interaction volumes to verify effective progress tracking. • Assess agents' availability, productivity, and key skills to optimize resource allocation and support targeted training.	sn_mgr_workspace.manager

Use case

Monitor your agent's work at the start of your day, act on urgent alerts, assess key performance areas, review ongoing tasks, and evaluate each agent’s performance.

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Data visualizations

Home tab KPIs

Title	Type	Description
Help Requested	Alert card	Notifications for assistance needed.
Overdue learnings	Alert card	Overdue training items.
Time off requests	Alert card	Requests from agents for time off.
Shift swap requests	Alert card	Shift swap requests by agents.
CSAT (Past 1 hr)	Gauge	Customer satisfaction score.
Interaction service level (Past 1 hr)	Single score	Adherence to target response time.
Average wait time (Past 1 hr)	Single score	Average duration customers wait for a response.
Volume by channel	Line	Analysis of workload across different communication channels.
Today's work status	Donut	Current status of tasks and responsibilities.
Open P1 cases	Table list	List of high-priority cases that require immediate attention.
Agent presence status	Donut	Current availability of agents.
Average agent utilization	Bar	How effectively agents time is being used.
Top skills in 24 hrs	Bar	Highlights of agent skills in demand.
Team's performance	Presentation list	Assessment of individual agent effectiveness using key metrics like Adherence and CSAT.

Related topics

Manager Workspace landing page

ServiceNow Otto for Customer Service Management (CSM)

Use the ServiceNow® ServiceNow Otto for Customer Service Management (CSM) application to summarize the case information, generate the case resolution notes, and summarize the chat for an interaction. You can enable your agents to understand the chat and case context so that they can propose quicker resolutions to your customers.

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Get started

Explore	Configure	Use Customer Service Management generative AI
Learn more about ServiceNow Otto for CSM	Configure the ServiceNow Otto for CSM application to get started	Use generative AI capabilities offered by ServiceNow Otto for CSM
	Use Agentic AI in CSM Use the ServiceNow Otto for CSM AI agents to complete tasks autonomously	

Important:

- Not all model providers are available for customers with in-country SKUs, and some AI 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 AI 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 AI 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 on AI and 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

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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 chat summarization, resolution notes generation, knowledge generation, call summarization), chat transcripts (for chat recommendation), and email information (for email response). 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 ServiceNow Otto for Customer Service Management (CSM)

With the ServiceNow Otto for Customer Service Management (CSM) application, your agents can use generative AI to summarize the customer chat conversations and case details to get the context of the case. They can also generate the case resolution notes to share with the other agents and wrap up cases faster.

Summarize a chat with Now Assist for Customer Service Management.

ServiceNow Otto for Customer Service Management (CSM) overview

The following generative AI capabilities are available for an agent:

- An interaction chat summary provides context about the chat conversation between your agents and customers at different points of the handoff. For example, when a Virtual Agent chat history is handed off to a live agent, or when one live agent hands off a chat to another live agent.
- A case summary enables an agent to gather the case context on long-running or complex cases. Because these cases can contain a lot of information, including the conversations with the customer or other agents, an agent can generate a summary to gain understanding faster.
- Case resolution notes assist an agent to wrap up cases faster and provide context to other agents who might encounter similar issues.
- A call summary assists an agent with obtaining the key details discussed during conversations between live agents and customers. It provides a high-level overview 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.
- Sidebar summary captures discussions between agents, requesters, and experts, and can be posted to case notes for further troubleshooting.
- Chat recommendation generates reply suggestions for agents using the ServiceNow Otto context menu.
- Email response generates reply suggestions for agents from existing or new emails using the ServiceNow Otto context menu.

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- Sentiment analysis helps reduce escalated cases by providing agents with the most current sentiment on a case, based on customer interactions and the latest trends. It also offers insights into why the sentiment is what it is today.
- Suggested steps generation resolves cases and boosts agent productivity by automatically outlining the next best actions for unfamiliar cases in the Recommended Actions tab.
- Sentiment analysis on an account uses filters and sorting dashboards to track sentiment, providing valuable insights and reducing escalated cases.
- Conversational subflows and actions in the ServiceNow Otto panel use natural language to trigger subflows or actions, improving agent productivity and task completion efficiency.
- The Portal case form guides requesters through a self-service flow using Genius Results, helping them find solutions and reducing the number of cases created.
- Automated quality assurance dashboard displays detailed agent performance metrics and quality assurance scoring data, accessible from the CRM Workspace.
- Special handling notes summarization skill condenses lengthy or multiple special handling notes into a brief, actionable summary. Agents view the summary in the Case Insights section to understand customer-specific handling requirements before engaging.
- Customer summarization skill generates a concise, consolidated summary of a customer for the agent to understand the details before engaging.

ServiceNow Otto for Customer Service Management (CSM) skills

The ServiceNow Otto for CSM application includes generative AI skills that enable your agents to understand the chat and case context. Agents can propose resolutions to the customer more quickly.

Chat summarization

Provides an agent with a summary of a customer's Virtual Agent chat history, live agent chat history, and the interaction history. Agents can view or create the following summaries:

- Virtual Agent chat handoff summary: Summarizes the conversation when Virtual Agent hands off a chat to a live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before engaging with a live agent.
- Live Agent to Live Agent handoff summary: Summarizes the conversation when a live agent hands off a chat to another live agent and displays the summary in the Active Chat window. An agent can view a summary of the actions that were taken by a customer before hand off to another live agent.
- Quick action summary: Provides a summary when an agent uses the `/summarize` quick action in the Active Chat window.
- Chat wrap up summary: Populates the **Chat Summary** and **Short description** fields on the interaction record when a live agent wraps up a chat with a customer.

> **Note:** If a chat summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

Sidebar discussion summarization

Provides an agent with a summary of the sidebar discussions between agents, requesters, and subject matter experts. An agent can also post the summary to the case work notes for further troubleshooting before or after the chat ends.

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Chat reply recommendation

Enables an agent to generate a reply recommendation from a chat using ServiceNow Otto context menu.

The chat reply recommendation skill displays a pop-up window that an agent can use to generate a recommendation and review it before sending it as a reply.

Case summarization

Provides an agent with a summary of a customer service case, including the issue and the actions taken. An agent can generate a summary of a case to understand the case context. The agent can refresh the summary to include the latest updates and post it to the case work notes.

The case summarization skill generates a case summary. The summary displays above the activity stream. The summary includes the information that the agent enters in the following case record fields:

- Short description
- Description
- Work notes
- Additional comments
- Email
- Service level agreement (SLA)

Email response

Enables an agent to generate an email response from an existing or new email using ServiceNow Otto context menu.

The email response skill displays a pop-up window that an agent can use to generate a recommendation and review it before sending it as a reply.

Resolution notes generation

Enables an agent to generate resolution notes for a case, propose the resolution to the customer, and add it to the case record.

The skill displays a pop-up window. An agent can use this window to select a resolution code and review the resolution notes text before proposing a resolution to a customer.

Note: The resolution notes generation skill requires a minimum of 50 words in the case record to generate the resolution notes. If the resolution notes can't be generated, the system displays a message below the **Resolution notes** field.

Knowledge generation

Enables an agent to generate 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 based on similar cases. The agent can review the draft before publishing the knowledge article.

Call summarization

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Provides an agent with a call summary when the call ends and includes the main points discussed during the call, including the issue and the actions taken. An agent can generate a call summary of the interaction to understand the case context and post the summary to the case work notes. An agent can view or create the following summaries:

- Chat wrap up summary: Populates the **Chat Summary** and **Short description** fields on the interaction record when a live agent wraps up a chat with a customer.

  Note: If a call summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

- Call summary from the ServiceNow Otto panel: Creates a summary of the conversation between the agent and customer from the panel by selecting **Summarize conversation**.

Sentiment analysis on a case

Sentiment analysis helps reduce escalated cases by providing agents with the most current sentiment on a case, based on customer interactions and the latest trends. It also offers insights into why the sentiment is what it is today.

Sentiment analysis on an account

Track the sentiment of a business-to-business account using filters and sorting dashboards to gain valuable insights and reduce escalated cases.

Conversational subflows and actions in ServiceNow Otto panel

Use natural language to trigger subflows or actions, enhancing agent productivity and allowing them to complete tasks efficiently within the panel. For more info, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.

ServiceNow Otto in Portal case form

Guide requesters through a self-service flow using Genius Results to find solutions and reduce the number of cases created. For more info, see Using Now Assist in portal case form.

Suggested steps generation

Suggested steps generation may help resolve cases and boost agent productivity by outlining the next best actions for unfamiliar cases in the Recommended Actions tab.

Activity response generation

Use the activity response generation skill to automatically generate recommendations for resolution notes, work notes, and comments. This feature helps agents add meaningful updates to case records, improving efficiency, and interaction. For more info, see Generate activity stream responses.

Trending topics dashboard

Get a comprehensive view of trending topics across cases along with insights and visualizations to facilitate deeper analysis. This feature helps support teams track trend progression, regional impact, and drill down into specific trends using customizable filters. For more info, see View trending topics dashboard.

Sentiment analysis dashboard

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Get a comprehensive view of customer sentiment across cases and accounts. The dashboard by default uses Azure to explain sentiment changes and lets you drill down to find root causes—helping teams take targeted actions. For more info, see Use sentiment analysis dashboard.

Automated quality assurance

View detailed agent performance metrics and quality assurance scoring data on the automated quality assurance dashboard, accessible from the CRM Workspace

Special handling notes summarization

Use the Special handling notes summarization skill to condense lengthy or multiple special handling notes into a brief, actionable summary.

Customer summarization

Use the Customer summarization skill for ServiceNow Otto for CSM to generate a concise, consolidated summary of a customer (account or consumer) rather than a single case. The skill synthesizes information across the customer's record. Agents can understand who the customer is and their current situation before engaging.

ServiceNow Otto in AI Search

The ServiceNow Otto in AI Search application uses Now LLM Service to extract actionable Q&A Genius Result answers from the knowledge articles that are found in Service Portal, Virtual Agent, Employee Center, and global searches. By using this application, an agent can improve the customer's experience by retrieving the relevant content from the knowledge base and generating concise answers. For more information, see ServiceNow Otto for AI Search.

ServiceNow Otto in Virtual Agent

ServiceNow Otto in the Virtual Agent guided setup can reduce the time and effort needed to deploy AI generated capabilities within Virtual Agent. Your administrators can configure features and skills and sources of information such as knowledge bases and catalogs. For more information, see Configure AI in Virtual Agent.

With the AI generated Multi-Turn Catalog Requests skill, your customers can engage with Virtual Agent in a conversational manner to request catalog items. A customer can request an item and then refine their search by providing additional information. For more information, see Multi-turn catalog ordering.

Sensitive data handling

Personally identifiable information and other sensitive data can be masked so that it does not appear in generative AI prompts. Placeholder text is sent with the prompt instead, and that placeholder text is replaced with the original text after the response has been received. This two-way masking ensures that your users see the correct values, but the Now LLM Service is not exposed to any sensitive information. For more information, see Multi-turn catalog ordering.

Supporting information for ServiceNow Otto for Customer Service Management (CSM)

Get a quick overview of the important information that is related to the ServiceNow Otto for Customer Service Management (CSM) application.

Supported versions

ServiceNow Otto for CSM is supported starting with Vancouver Patch 4.

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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.

Supported language models

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI 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 AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

Supported user interfaces

The ServiceNow Otto for CSM application includes the skills that are listed in the following table.

ServiceNow Otto for CSM supported interfaces

Interface	Skill
CRM Workspace	• Chat summarization • Case summarization • Resolution notes generation • Knowledge article generation • Call summarization • Sidebar discussion • Chat recommendation • Email response • Sentiment analysis • Suggested steps generation • Sentiment analysis dashboard • Trending topics dashboard • Activity response generation
Core UI	• Case summarization • Resolution notes generation • Knowledge article generation • Sentiment analysis • Activity response generation

Languages supported

ServiceNow Otto for CSM supports the following languages across all skills:

- German
- French

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- Japanese
- Dutch
- French Canadian
- Spanish
- Brazilian Portuguese
- Italian

For more info, see Configure multilingual service for ServiceNow Otto applications

Role masking for ServiceNow Otto for CSM agentic workflows, AI agents, and skills

Role masking is used to restrict user access to agentic workflows, standalone AI agents, and skills. This ensures that users only receive the permissions necessary for their tasks, enhancing security and reducing the risk of unauthorized access.

How Role Masking Works

Imagine a user assigned roles A, B, and C, where each role grants access to a specific set of data. Normally, only if using Access Control Lists (ACLs), the user could access any data or functions available to roles A, B, and C. With role masking applied, the user can only access data tied to the active role, limiting exposure to unnecessary information.

Role Masking Considerations for *ServiceNow Otto for CSM* Skills

When a CSM skill runs, its features are initially controlled by ACL permissions, ensuring users only access authorized data and functions. If the skill uses a large language model (LLM) to perform its task, role masking adds an extra layer of control. Role masking filters the LLM-generated output according to the user's active role.

Consider a user with roles A, B, and C, each granting different privileges. If the ACLs defined in the Case Summarization are roles A, B, and C and the masking role defined is role A, If the user activates the Case Summarization skill, and selects Summarize, the process occurs in two steps:

1. **Data Retrieval**

   ACL permissions for role A are applied to fetch relevant case data. This ensures the user only sees data they are authorized to view.

2. **Data Summarization**

   After data retrieval, an LLM summarizes the case. Role masking is then applied to the output, tailoring the summary to the access privileges defined for role A.

By applying both ACL permissions and role masking, the system ensures a secure and granular access control mechanism for CSM skills. This protects sensitive information while providing users with the insights needed to perform their tasks effectively.

AI color gradient support

ServiceNow Otto for CSM supports the AI color gradient across the following skills and workflows:

- Case summarization
- Resolution notes generation
- KB generation

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- Call summarization
- Sidebar discussion
- Chat recommendation
- Email recommendation
- Sentiment analysis case
- Suggested steps generation
- Sentiment analysis dashboard
- Trending topics dashboard
- ServiceNow Otto context menu activities- tone and refining options

Application information

Activate the ServiceNow Otto for CSM store app (sn_csm_gen_ai) to use the chat and case summarization skills and to generate case resolution notes.

This store app has the following dependencies:

- Case Management Core (com.sn_customerservice)
- UXC Generative AI (sn_uxc_gen_ai)

Activate the applications in the following order:

1. Customer Service
2. UXC Generative AI
3. ServiceNow Otto for CSM

For more information, see Configuring ServiceNow Otto for Customer Service Management (CSM).

Configuring ServiceNow Otto for Customer Service Management (CSM)

If you have the admin role, you can configure the ServiceNow Otto for Customer Service Management (CSM) application so that your agents can use the generative AI skills in CRM Workspace and in Core UI.

Use the AI Admin Hub console to configure ServiceNow Otto for CSM. This console contains everything that you must install the plugins and configure the generative AI skills. For additional information, see Overview tab in AI Admin Hub.

The following table lists the features and skills that you can access from the console.

CSM features and skills in the console

CSM features	Skills
Chat	• Chat summarization • Chat recommendation • Sidebar recommendation

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CSM features and skills in the console (continued)

CSM features	Skills
Case	• Case summarization • Resolution notes generation • Email recommendation • Suggested steps generation • Sentiment analysis case • Trending topics dashboard • Activity response generation • Sentiment analysis dashboard
Knowledge	KB generation
Call	Call summarization

Note:

- Learn how to select an LLM provider to configure all AI generated skills at once. Your choice controls the intelligence layer for the entire capability. For more info, see Manage AI models and Manage model providers.
- The minimum version of the workspace required to support ServiceNow Otto for CSM features:
  - CRM Workspace Foundation (sn_cwf_wrkspc): 24.2.1.
  - CRM Workspace (sn_csm_wrkspc): 24.2.0.

For earlier versions, go to Application Manager to upgrade it to a later version.

Related topics

Overview tab in AI Admin Hub

Configuring Now Assist Admin features

Using agentic AI in ServiceNow Otto for Customer Service Management (CSM)

Customer Service Management AI agent collection triage cases agentic workflow

Install ServiceNow Otto for Customer Service Management (CSM)

Install required plugins and enable ServiceNow Otto for Customer Service Management (CSM) to configure and use generative AI skills in Configurable Workspace and Core UI.

Before you begin

Role required: Admin

About this task

To get started with AI generated skills, you must install at least one AI generated application on your instance. The AI Admin Hub can guide your implementation, starting with installation.

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For information about the plugin dependencies and plugin activation order, see Supporting information for ServiceNow Otto for Customer Service Management (CSM).

For information about CRM Workspace, see Set up CRM Workspace. For information about AI agents, see Install AI Agents.

To access AI agents in the ServiceNow Otto panel, you must turn on the panel and confirm that the case summarization is active on the instance.

To install the ServiceNow Otto for CSM plugin (sn_csm_gen_ai), follow the procedure below.

Procedure

1. Navigate to **Admin > AI Admin Hub > Settings**.
2. On the **Settings** page, select**Plugins**.
3. Select **Get plugins** on the card for the plugin that you want to install.
4. In the confirmation window, select Install Plugin to open the ServiceNow Store page for the plugin in a new browser tab.
5. Install the plugin from the ServiceNow Store page.
6. Return to the admin console.
7. In the dialog box, select **Refresh**.
8. Either close the dialog box to review all of your plugins or select **View all <Plugin> Assists and Skills** to review the features of your new plugin.

   For more detailed information about the installation process, see Install Now Assist plugins.

Activate ServiceNow Otto Skills

Turn on the AI skills to automate tasks such as case summarization, wrap-up completion, and conversational knowledge search- reducing manual work and improving case resolution speed.

Activation configures which skills agents access, where they appear, and which roles can use them. You customize prompts and set availability conditions so AI capabilities appear only where they add value.

This video provides an overview of how you can set up skills and monitor and analyze usage via the AI Admin Hub console.

https://url.us.m.mimecastprotect.com/s/j3ebC5yz70hgOm7YWfzfZikEhy0?domain=player.vimeo.com

Each skill is configured separately, and tailored to support agents across various platforms. The following AI generated skills are available to be configured for use within CSM.

AI generated skill overviews

Skill	Description
Chat Summarization	Generate condensed summaries of conversations between agents or Virtual Agents and highlight key points for quick reference. For more information, see Configure chat summarization.
Call Summarization	Generate summaries of agent-customer calls within the Active Chat window to capture key call details for better agent follow-up and record keeping. For more information, see Configure call summarization.

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AI generated skill overviews (continued)

Skill	Description
Resolution Notes	Create summaries of case resolutions to help agents quickly understand resolution details and reference notes in future similar interactions. For more information, see Configure resolution notes generation.
Knowledge Generation	Draft knowledge articles based on resolving case tasks for agents to review and edit before publishing. For more information, see Configure knowledge generation.
Chat Reply Recommendation	Help agents generate replies for chat messages based on conversation context. For more information, see Configure chat recommendation.
Email Recommendation	Generate and refine efficient email responses based on conversation context. For more information, see Configure email recommendation.
Sentiment Analysis	Analyze case sentiment, trends, and reasoning from case inputs, helping agents resolve cases more efficiently. For more information, see Configure sentiment analysis case.
Suggested steps	Generate suggested steps automatically by analyzing clusters of closed cases with similar case resolution. For more info, see Configure Suggested Steps Generation.
Sidebar summarization	Generate a summary of Sidebar discussions between agents, requesters, and subject matter experts quickly. For more info, see Configure Sidebar Summarization.
Case summarization	Summarize the case details and display this information on the case record, helping the agents to come to speed quickly on cases. For more info, see Configure Case Summarization.
Activity response generation	Automatically generate recommendations for resolution notes, work notes and comments, helping agents add informative updates to case records For more info, seeConfigure activity response generation.
Trending topics dashboard	View trending topics across cases with insights and visualizations, helping track trend progression, regional impact, and drill down into specific trends using customizable filters. For more info see, Configure trending topics dashboard.
Sentiment analysis dashboard	Gain a complete picture of customer sentiment across all cases. This dashboard leverages LLM-powered analysis to explain sentiment trends and their underlying drivers. Drill down into specific patterns to identify root causes and access real-time insights that enable managers to take precise, informed action. For more info, see Use sentiment analysis dashboard
Customer summarization	Generate concise summaries of customer interactions and case history, capturing key details, decisions, and context in one view. This helps agents quickly understand the customer's situation without reading through lengthy case notes, improving first-contact resolution and personalization. The skill pulls relevant information from case records and activity streams to create a structured summary that enables agents to respond more effectively and efficiently. For more info see, Configure Customer summarization in ServiceNow Otto for CSM.
Special handling notes summarization	Automatically capture and organize critical handling instructions from customer records, creating a concise summary of special requirements, restrictions, or preferences that agents must know. This

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AI generated skill overviews (continued)

Skill	Description
	helps agents quickly identify important context- such as accessibility needs, communication preferences, or service constraints- without searching through scattered notes. For more info see, Configure special handling notes summarization in ServiceNow Otto for Customer Service Management (CSM).
AI in portal case form	Enable the customers to receive AI-powered assistance directly within the self-service portal when submitting or updating cases. Customers can get real-time suggestions, recommended solutions, or clarifying questions as they fill out case forms, improving issue description quality and reducing resolution time. For more info, see Set up AI in the portal case form.
Service Recommendations for Interactions	Use AI to suggest relevant services, products, or solutions to agents during customer interactions based on customer history and needs. Agents receive real-time recommendations that help identify cross-sell and up sell opportunities while addressing the customer's current issue. For more info, see Configure service recommendations for interactions
Complaint case summarization	Automatically generate concise summaries of customer complaints, capturing the core issue, customer sentiment, and resolution details in a structured format. This helps agents and managers quickly understand complaint severity and root causes without reading through lengthy complaint notes, enabling faster escalation and resolution. For more info, see Customer Service Management accelerate complaint case handling AI agent collection

General Configuration Steps

Each skill has it's own configuration process. However, skill activation follows the same guided setup. What configuring steps are required varies depending on the skill.

Common Configuration components:

- **Trigger:** Allows you to configure the circumstances in which a skill is generated. For example, chat summarizations can be configured to generate when the chat handoff is done from a live agent to a live agent.
- **Input:** Configure the data used to create the information generated by the skill. For example, resolution notes information is generated from the description, short description, work notes, and the additional comments fields of existing case notes.
- **Availability:** customize how and when the skill capability is active and accessible. For example, email reply recommendations can be configured to be always available. You can also use the condition builder to determine whether a user can activate the skill.
- **Access:**determine who can access this skill. By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.
- **Display:** determine where the skill appears. For example, the call summarization skill can be configured to display on forms and workspaces or in the ServiceNow Otto panel.

Saving and activating the configuration setup process is the same across all AI generated skills.
Finalize and Activate Setup

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1. After selecting **Review and Activate** to examine changes, select **Done** to close the skill configuration settings.
2. Select **Skill** to turn on the skill for agents and complete the configuration.

> **Note:** You can clone and customize the activated skills. For more info, see Clone the ServiceNow Otto for CSM skills and Customizing a ServiceNow Otto for CSM skill

Select an LLM provider: Learn how to select an LLM provider to configure all AI generated skills at once. Your choice controls the intelligence layer for the entire capability. For more info, see Manage AI models and Manage model providers.

Configure chat summarization

Configure Chat Summarization to generate condensed summaries of conversations between agents or with a Virtual Agent, highlighting key points for quick reference.

https://player.vimeo.com/video/1102593484?h=b893388394&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: Admin

Chat summarizations are generated when:

- The conversation ends.
- The agent uses the summarize quick action in Agent Chat.
- The user selects chat summarization or enters summarize chat in the Ask AI field on the ServiceNow Otto panel.
- A live agent transfers an interaction to a different live agent.

  When an interaction is transferred from a Virtual Agent to a live agent and is at least six lines long, the chat summarization displays in a summary card. The summarization also populates the interaction's summarization and short description fields.

Procedure

1. Navigate to **Admin > AI Admin Hub > AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Chat Summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define Triggers** and switch the toggles to choose how and when the summarization is configured.

Triggers for the chat summarization skill

Trigger	Description
Virtual Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from Virtual Agent to a live agent.
Live Agent to Live Agent handoff	Chat summary that is generated when the chat handoff is done from a live agent to a live agent.

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Trigger	Description
Quick action	Chat summary that is generated when the live agent performs the `/summarize` quick action.
Chat wrap-up	Chat summary that is generated when the live agent ends the chat. The **Chat Summary** field is updated for the interaction.
Short description	**Short description** field that is updated for the interaction when the live agent ends the chat.
Task creation	**Short description** and **Description** fields that are auto-populated on the task record when a task is created from an interaction.

You can also toggle the bulleted list property to display the chat summary as an unordered list.

5. Select **Choose Input** and review the portal and channel selections that determines where data is pulled from.

   Note: You cannot modify or deselect the default product portal data source. Additionally, portals that are already in use by other products cannot be selected.

Table 2: Inputs for the chat summarization generation skill

Input	Description
Input fields	○ CSM (Default portal for CSM) ○ CSP (Default portal for CSM) ○ AIS_ADMIN_TOOLS ○ APM ○ APM_PLANNER ○ ARC ○ ASC ○ ASC_OLD ○ ASP ○ ASSIGN_INSIGHTS_OWNER ○ BENCHMARKS ○ BLANK ○ BLSP ○ BUSINESS_PORTAL ○ CAB ○ CEM ○ CLAROTY_CTD_VR ○ CLOUD_ADMIN_PORTAL ○ CLOUD_PORTAL ○ COMMUNITY ○ COMMUNITY_CXS ○ CONTENT_DELIVERY_DEMO

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Input	Description
	○ CSM_OUTLOOK ○ CSM_WALKUP ○ DB_BUILDER ○ DEMO_BUILDER ○ DH_TOOLS ○ DHAPP ○ DHAPP_DSP ○ DHBE ○ DHEXECON ○ ECDEMO_KIOSK ○ ECK ○ EESP ○ ELP ○ EMEXP ○ ESG_REPORTING ○ FSMCP ○ IDEA ○ INDEMO ○ INDUSTRY ○ INDUSTRYDEMO ○ KB ○ KIOSK ○ LEGAL ○ LEGAL_OUTLOOK ○ LMP ○ MEB ○ MESP ○ MOA ○ MY_WORK_HUB ○ NEW_HIRE ○ PC ○ PERF ○ PPSRP ○ PPSWORKBENCH ○ PPT ○ PROGRAM_STATUS ○ PROJECT_STATUS ○ RC

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Input	Description
	○ SNCOUTLOOK ○ SP ○ SP_CONFIG ○ SUPPLIER ○ SVDP ○ SWP ○ TCP ○ WALKUP ○ WS ○ WSDDEMO ○ ECDEMO ○ ECKDEMO ○ ESC ○ ESCP

6. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
7. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:
   - If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they will be updated automatically by a script.
   - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

     Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.
8. Select **Display** to determine where the resolution notes appear.
   - Select **In-product desktop** to display AI skills on forms and workspaces.
   - Select **panel** to display AI skills in the ServiceNow Otto panel.
9. After selecting **Review and Activate** to examine changes, select **Done** to close the Chat Summarization generation settings.
10. Select **Skill** to turn on the skill for agents and complete the configuration.

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Configure call summarization

Configure Call Summarization to automatically generate summaries of agent-customer calls within the Active Chat window to capture key details for better agent follow-up and record keeping.

Before you begin

Role required: admin

Call summarization is generated from the information that you enter in the following fields:

- Conversation Transcript
- Short Description (automatically populated at the end of call)
- Chat Summary (automatically populated at the end of call)
- Integration setup:

> **Note:** Ensure that your telephony or call center system is integrated with ServiceNow if call data needs to be captured directly. For more information, see Interaction Controls Component (ICC) for voice calls and Integrating contact centers with Interaction Controls Component (ICC) for callbacks.Additionally, set your status as **Available** in CRM Workspace to be able to receive call requests from customers.

Any modifications to the names or labels of these fields can result in issues with summarization generation.

> **Note:** You can't modify a skill's input data source in base system. However, you can clone the skill in AI Skill Kit

Procedure

1. Navigate to **Admin >AI Admin Hub >AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Call Summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define Triggers** and switch the toggles to choose how and when the summarization is configured.

Table 1: Triggers for the call summarization skill

Trigger	Description
Live Agent to Live Agent handoff	Call summary that is generated when the call handoff is done from a live agent to a live agent.
Call wrap-up	Call summary that is generated when the live agent or the user ends the chat. The **Chat summary** field is updated for the interaction.
Short description	**Short description** field that is updated for the interaction when the live agent or the user ends the call.
Task creation	**Short description** and **Description** fields that are auto-populated on the task record when a task is created from an interaction.

You can also select toggle a property that controls how a call summary is displayed.

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Table 2: Property for the call summarization skill

Property	Description
Bulleted list	Call summary as an unordered list.

5. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they will be updated automatically by a script.
   - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

     Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you must manually select it in **Select Display** to make it active.

6. Select **Display** to determine where the resolution notes appear.
   - Select In-product desktop to display AI skills on forms and workspaces.
   - Select ServiceNow Otto panel to display AI skills in the panel.
7. After selecting **Review and Activate** to examine changes, select **Done** to close the Call Summarization generation settings.
8. Select **Activate** to turn on the skill for agents and complete the configuration.

Configure resolution notes generation

Configure the Resolution Notes skill to create concise summaries of case resolutions, helping agents quickly understand resolution details and support future similar interactions.

https://player.vimeo.com/video/1102610959?h=a8ec16d88d&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: admin

Case resolution notes are generated from the information that you enter in the following fields:

- Short Description
- Description
- Work Notes
- Additional Comments

Any modifications to the names or labels of these fields can result in issues with notes generation.

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Note: Revert to the default field name and field label for the affected fields. To remove incompatible fields from summarization, confirm a copy of the skill has been created, as not all fields are removable/configurable.

Procedure

1. Navigate to **Admin > AI Admin Hub > AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Resolution Notes Generation** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note: You can't modify the input data source.

   Inputs for the resolution notes generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Description ○ Short description ○ Work notes ○ Additional comments ○ Email

5. Select **Define Triggers** and switch the toggle to require user input before resolution notes are created.
6. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
7. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.

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- If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

  Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

8. Select **Display** to determine where the resolution notes appear.
   - Select In-product desktop to display AI skills on forms and workspaces.
   - Select ServiceNow Otto panel to display AI skills in the panel.
9. After selecting **Review and Activate** to examine changes, select **Done** to close the Resolution Notes Generation settings.
10. Select **Activate** to turn on the skill for agents and complete the configuration.
    Skill is activated for agents and a success modal shows up with the option to **Return to CSM** and to **Go to ServiceNow Otto content menu**.
11. Select **Go to ServiceNow Otto context menu** to configure the activity response generation skill's context menu in AI Experience.

Related topics

Generate the resolution notes for a case by using ServiceNow Otto for Customer Service Management (CSM)

Configure extended tables

Create a child skill variant of the resolution notes generation skill to create concise summaries of case resolutions, helping agents to quickly understand resolution details.

Before you begin

Role required: Admin to copy and configure the skill in AI Admin Hub (NAA). sn_skill_builder.admin to edit input configurations in AI Skill Kit.

Confirm the following prerequisites are met before you begin:

- Your instance must be running **uxc-generative-ai** version 12.2.2 or later.
- The base resolution notes generation skill must already be activated.

About this task

When you copy the resolution notes generation skill in AI Admin Hub, a child skill is created that inherits the parent skill's configuration. You then open the copied skill in AI Skill Kit to select the target child table. Configure the additional input fields that are injected into the AI prompt for that table. After you configure and publish the skill in AI Skill Kit and activate it in AI Admin Hub, the platform automatically uses the child skill. The child skill is triggered when an agent generates Resolution Notes on a case record that belongs to the extended table.

Procedure

1. Navigate to > > **Admin** > **AI Admin Hub** > **AI Skills**.
2. Select the **Customer** workflow and **CSM** as the product.
3. Locate the **Resolution notes generation** skill and select **Make a copy**.
4. In **General Details**, enter a name for the child skill that reflects the target case subtype.
5. **Optional:** Enter a short description specific to this child skill.
6. Select **Save and continue**.

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The child skill is created and inherits the parent skill's configuration. You cannot change the table name of the copied skill in AI Admin Hub. Table selection is performed in AI Skill Kit as the next step.

7. Navigate to **AI Skill Kit** > **ServiceNow skills**.
8. Locate the copied skill you created earlier and open it.
9. Select **Choose Input** by clicking Edit Skill Input pencil icon available under Skill contents.
10. Select the child or extended table that this skill variant should apply to.
    For example, select **Complaint [sn_customerservice_complaint]** from input table drop-down.
11. Add one or more additional input fields from the selected table to include in the AI prompt.
    For example, add **Account**, **Additional comments**, or **Address**. These fields are appended to the base prompt inputs inherited from the parent skill.
12. Select **Save and continue**.
13. **Optional:** Select **Clone prompt** to edit the prompt.
14. Complete skill configuration in AI Admin Hub, by selecting **Define Availability** to set conditions for when this child skill is active.
    - Select **Skill is always available** to apply no restrictions.
    - Select **Customize skill availability** to define conditions using the condition builder.
15. Select **Define Access** to control which roles can use this child skill.
16. Toggle **Display** to make the skill visible in the in-product desktop for agents.
17. Select **Review and Activate** to review your configuration, then select **Done**.
18. Select **Activate** to turn on the child skill for agents.
    The resolution notes generation child skill is active for the selected extended table. When an agent triggers **Resolution Notes Generation** on a case record that belongs to the configured child table, the platform automatically uses the child skill and its custom input fields to generate concise summaries of the case.

Configure knowledge generation

Configure the Knowledge Generation skill to draft knowledge articles on resolving case tasks for agents to review and edit before publishing.

Before you begin

Verify that the following is set up before you activate the skill:

1. Install the Required Plugin- ServiceNow Otto for CSM plugin.
2. Enable KCS system properties: The visibility of the **Create Knowledge** action in CRM Workspace depends on specific system properties and differs from its implementation in the Core UI UI.
    - In Core UI, the action is implemented as a UI Action.
    - In CRM Workspace, it is implemented as a Declarative Action.

    The visibility and behavior of the **Create Knowledge** button in the CRM Workspace depends on two system properties:

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- sn_customerservice.enable_knowledge_kcs: If this property is true, the button appears in the CRM Workspace.
- sn_customerservice.kcs.enable_template_on_case_workspace
  - If this property is false, the button is a UI Action and clicking it does not open a template selector.
  - If this property is true, the button is a Declarative Action and clicking it opens a template selector modal.

If either property is turned off, the action will not appear in CRM Workspace—even if it is visible in Core UI.

3. Activate the KCS template.
   a. Navigate to **All** > **Knowledge** > **Administration** > **Article Template**.
   b. Locate the **KCS Article**.
   c. Set its status to **Active**.

Important:

- For ServiceNow Otto panel, if property sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled then it will create article using standard template for cases.
- For Core UI / Workspace, if sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled then it will not show **Create Knowledge** button on case form.

Role required: admin

The knowledge generation skill incorporates information that you enter in the following fields:

- Short Description
- Description
- Resolution Notes
- Work Notes
- Comments

Any modifications to the names or labels of these fields can affect the generation and quality of knowledge generation articles. So, don't change field names or labels after you select them as the skill won't recognize the changes.

Note:

It is preferable to revert to the default field name and field label for the affected fields. To remove incompatible fields from generation, confirm a copy of the skill has been created, as not all fields are removable/configurable. Additionally, confirm that the Knowledge Management advanced installer plugin is enabled and the following system properties are set to TRUE:

- sn_customerservice.enable_knowledge_kcs
- kcs.enable_template_on_case_workspace

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Procedure

1. Navigate to **Admin > AI Admin Hub>AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **KB Generation** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note: You can't modify the input data source.

   Table 1: Inputs for the knowledge article generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Short description ○ Description ○ Resolution notes (for cases and incidents) ○ Work notes ○ Comments

   Note: When you select **Run Test**, a new task record input window appears where the user can select an input record from the drop-down through which the system automatically resolves and populates all the required fields.

5. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they are updated automatically by a script.
   - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

     Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

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7. Select **Display** to determine where the KB generation appears.
   - Select In-product desktop to display AI skills on forms and workspaces.
   - Select ServiceNow Otto panel to display AI skills in the panel.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the KB generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.

Configure chat recommendation

Use the guided setup in the AI Admin Hub console to configure chat recommendation by defining triggers, specifying inputs, setting the display location, and activating the feature.

https://player.vimeo.com/video/1102629744?h=8ef1126c0e&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: admin

Using the chat recommendation skill, you have the options to:

- Generate a recommended reply based on the context of the conversation.
- Refine the recommendation by elaborating or shortening the response.

Procedure

1. Navigate to **All > AI Admin Hub> AI Skills**.

   If you're already in the AI Admin Hub, select the AI Skills tab.

2. On the navigation panel, select **Customer**.
   Each workflow contains feature sets.
3. Select **CSM** as the product.
4. Select **Activate Skill** for the Chat Recommendation skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
5. Go to **Define Triggers**, the first step in the guided setup.

   By default, many of the options in the setup are configured for the most common use cases. You select the step in the guided setup navigation to go back and change the configurations in previous steps. You can also use Back to navigate through the steps.

6. Using the toggles, select the actions trigger for the Chat Recommendation skill.
7. Select **Choose Input** and review the portal and channel selections that determines where data is pulled from.

   Note: You cannot modify or deselect default skill input data sources.

8. Select any additional data sources that you want the Large language model (LLM) to take into account when generating a recommendation.
9. Select a portal for the data source for chat recommendation to be generated for the conversation occurring on that portal.

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This is a mandatory step. Specify a portal and enable a specific channel on the Choose Input page. This enables the skill for chats sent in the selected portal or channel. Otherwise, the agent will receive an error message: "Chat summaries won't appear until your IT administrator completes all the required steps involved in the setup".

10. Select **Define Availability** to customize how and when the skill capability will exist and be available.
    - Select **Skill is always available** so no restrictions are placed on when a skill is available.
    - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
11. Select **Define access** to determine who can access this skill.

    By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:
    - If no changes are made, the default role sn_customerservice_agent or sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
    - If custom roles were added before the upgrade, they are updated automatically by a script.
    - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

    Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

12. Go to **Select display**, the last step, and select where you would like to display the skill.

    You can select both in-product, ServiceNow Otto panel, or both.

    Note: Chat recommendation is not available in the panel.

    - **In-product desktop**: When selected, AI skills are displayed on forms and workspaces.
    - *ServiceNow Otto* **panel**: When selected, AI skills are available in the panel. Select the down arrow to identify the roles that can use the skill. Select the arrow next to toggle, to select roles who can access the skill. You can add roles by entering the name of the role in the **User roles** field. You can remove existing roles by selecting the X icon in the role bubble. You must have at least one role specified, but you can add as many roles as you like.
13. Review your choices and complete the configuration by selecting **Activate**.

Result

Chat recommendation for the workflow is active on the instance.

Configure email recommendation

Configure email reply recommendation to help agents generate and refine efficient email responses based on conversation context.

https://player.vimeo.com/video/1102601949?h=60957c119c&badge=0&autopause=0&player_id=0&app_id=58479

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Before you begin

Role required: admin

Email reply recommendations are generated from the information that you enter in the following fields:

- Short description
- Description
- All journal fields
- Emails

Procedure

1. Navigate to **Admin > AI Admin Hub > AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Email Recommendation** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note: You cannot modify the input data source.

   Table 1: Inputs for the Email Recommendation generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Short description ○ Description ○ Emails ○ Additional Comments ○ Work Notes ○ Activity

5. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

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- If no changes are made, the default role sn_customerservice_agent or sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
- If custom roles were added before the upgrade, they'll be updated automatically by a script.
- If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

  Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

7. Toggle **Display** to determine if email recommendation appears in In-product desktop, displaying AI skills on forms and workspaces.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the Email Reply generation settings.
9. Select **Activate** to turn on the skill for agents and complete configuration.

Configure extended table support for email reply recommendation skill

Create a child skill variant of the Email reply recommendation skill to generate AI-powered email replies tailored to a specific case subtype or extended table.

Before you begin

Role required: **Admin** to copy and configure the skill in AI Admin Hub. **sn_skill_builder.admin** to edit input configurations in AI Skill Kit.

Confirm the following prerequisites are met before you begin:

- Your instance must be running **uxc-generative-ai** version 12.0.3 or later.
- The base Email reply recommendation skill must already be activated.

About this task

When you copy the Email reply recommendation skill in AI Admin Hub, a child skill is created that inherits the parent skill's configuration. Open the copied skill in AI Skill Kit to select the target child table. Configure the additional input fields that are injected into the AI prompt for that table. Once configured, the platform automatically uses the child skill when an agent triggers Email Reply Recommendation on a case record that belongs to the extended table.

Procedure

1. Navigate to > > **Admin** > **AI Admin Hub** > **Skills**.
2. Select the **Customer** workflow and **CSM** as the product.
3. Locate the **Email Reply Recommendation** skill and select **Make a copy**.
4. In **General Details**, enter a name for the child skill that reflects the target case subtype.
   For example, enter **Email Reply Recommendation- Complaint**.
5. **Optional:** Enter a short description specific to this child skill.
6. Select **Save and continue**.
   The child skill is created and inherits the parent skill's configuration. You can't change the table name of the copied skill in AI Admin Hub. Table selection is performed in AI Skill Kit as the next step.
7. Navigate to **AI Skill Kit** > **ServiceNow skills**.

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8. Locate the copied skill you created earlier and open it.
9. Select **Choose Input** by clicking Edit Skill Input pencil icon available under Skill contents.
10. Select the child or extended table that this skill variant should apply to.
    For example, select **Complaint [sn_customerservice_complaint]** from input table drop-down.
11. Add one or more additional input fields from the selected table to include in the AI prompt.
    For example, add **Account**, **Additional comments**, or **Address**. These fields are appended to the base prompt inputs inherited from the parent skill.
12. Select **Save and continue**.
13. **Optional:** Select **Clone prompt** to edit the prompt.
14. Complete skill configuration in AI Admin Hub, by selecting **Define Availability** to set conditions for when this child skill is active.
    - Select **Skill is always available** to apply no restrictions.
    - Select **Customize skill availability** to define conditions using the condition builder.
15. Select **Define Access** to control which roles can use this child skill.
16. Toggle **Display** to make the skill visible in the in-product desktop for agents.
17. Select **Review and Activate** to review your configuration, then select **Done**.
18. Select **Activate** to turn on the child skill for agents.
    The Email reply recommendation child skill is active for the selected extended table. When an agent triggers **Email Reply Recommendation** on a case record that belongs to the configured child table, the platform automatically uses the child skill and its custom input fields to generate the email reply suggestion.

Configure sentiment analysis case

Configure Sentiment Analysis to evaluate case sentiment, trends, and reasoning from case inputs, helping agents resolve cases more efficiently.

Before you begin

Role required: admin

Sentiment analysis is generated from the information that you enter in the following fields:

- Description
- Short Description
- State
- Priority
- Additional Comments

Any modifications to the names or labels of these fields can result in issues with sentiment analysis.

Sentiment is calculated using several factors:

- Latest requester comment
- Previous comments for context

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- Sentiment history (trend)
- Issue complexity and priority
- SLA breach status
- Feedback in comments
- Frequency of updates and response time
- Language tone

The Sentiment Reasoning field in the record provides details on which factors were considered for reasoning. This includes:

- Exact tone in the given inputs.
- Feedback in recent comment.
- Task priority.
- SLA consideration.

Procedure

1. Navigate to **Admin > AI Admin Hub> AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Sentiment Analysis Case** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note: You can't modify the input data source.

   Table 1: Inputs for the sentiment analysis skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	○ Description ○ Short Description ○ State ○ Priority ○ Additional Comments

6. Select **Role attribution**

   Note: You can't modify the input data source.

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Table 2: Inputs for the sentiment analysis skill

Input	Description
Input table	Case [sn_customerservice_case]
Requestor fields	○ Consumer ○ Contact ○ Created by ○ Opened by

7. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
8. Select **Define Trigger** and edit the job schedule period to configure how often the skill will be implemented.

   To enable a scheduled job for a custom table, follow these steps:

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

   b. Search and select **Sentiment analysis scheduler job CSM**.

   c. Replace the table name sn_customerservice_case with the name of your custom table in the script.

   d. Select **Update**.
9. Select **Enable dashboard** to see sentiment analysis across cases.
10. Select **Define access** to determine who can access this skill.

    By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:

    - If no changes are made, the default role sn_customerservice_agent or sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
    - If custom roles were added before the upgrade, they'll be updated automatically by a script.
    - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

    Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.
11. In **Select Display** toggle to determine if chat recommendation appears in In-product desktop, displaying AI skills on forms and workspaces.
12. After selecting **Review and Activate** to examine changes, select **Done** to close the Sentiment Analysis generation settings.
13. Select **Activate** to turn on the skill for agents and complete the configuration.

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Trouble?
Additional information:

- Verify that CRM Workspace Foundation plugin version is 25.1.4
- To access the Sentiment field, refer to the information available at these KB links:
  - Sentiment analysis card is missing in case records in both CSM UI16 and workspace UIs on ServiceNow Otto for CSM Sentiment Analysis feature activation.
  - Sentiment analysis card display on a record in CSM workspace

Change an insight to use a different field for sentiment analysis

Change a sentiment analysis insight to display sentiment data from a different field. This requires updates to both the UI Builder component and AI Skill Kit.

Before you begin
Role required: admin or maint

General ServiceNow platform knowledge is required for this procedure.

About this task
For sentiment analysis insights, changing the field requires modifications to both the UI Builder component and the associated AI Skill Kit skill. It involves cloning components, creating new skills, and modifying scripts. This procedure confirms proper configuration of the sentiment analysis insight with a different field.

The Sentiment analysis dashboard includes the following UI Builder components:

- Default Sentiment Analysis Dashboard
- Sentiment Over Time Visualization
- Sentiment Breakdown Visualization
- Sentiment Top Drivers Insight (Negative sentiment and Positive sentiment drivers)
- Sentiment by Assignment Group Insight
- Sentiment After Escalation Insight
- Sentiment by Channel Insight

Procedure

1. Navigate to **All** > **UI Builder**.
2. Under **Components** tab search for the corresponding component.

   For example, open **Sentiment by Channel Insight**. Make a clone if needed.
3. Duplicate **Sentiment by Channel Insight**
4. Rename all components to your desired field (for example, Consumer) or create a generalized component name.

   Update the following:
   - UIB component name (in Settings) and **Save**
   - Stylized text title (in Editor)
5. In the **Get Sentiment by Field Data resource**, change the **Field(s)** value to your desired field ID.
   For example, consumer.

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6. In a new tab or window, navigate to **All** > **AI Skill Kit**.
7. Under **ServiceNow skills**, search for **Sentiment by Channel Insight**.
8. Select **Clone** to clone the skill under your desired field name.
9. Under the **Tool editor**, select **SentimentChannelScript** and open the tool.
10. Replace every instance of the existing field (contact_type) with your desired field (consumer).
11. Select **Continue** till the **Edit script tool** guided set up reaches summary page.
12. Select **Save changes**.
13. In the **Prompt editor** tab, replace every instance of "channel" except the very last occurrence in {{SentimentChannelScript.output}}.
14. Select **Finalize prompt**.
15. **Publish** the prompt.
16. Navigate to the sys_one_extend_capability table and find the record corresponding to the AI Skill Kit skill you just created.
    Right click to copy the sys_id.
17. Return to the UI Builder page and in the **Get Sentiment Insight by Capability ID** data resource, paste the copied sys_id from previous step into the **Capability ID** field.
18. Select **Save**.
    Now add the newly created component to any base system dashboard page or your own custom page. Use other nearby insights as reference for the correct event handler and optimization setup.
    The sentiment analysis insight now uses the specified field to display data and the associated AI skill has been properly configured.

Related topics

Add a filter

Change graph visualization

Sentiment analysis for email interactions

Configure Sentiment analysis for email interactions to evaluate sentiment, trends, and reasoning at interaction level and help agents resolve cases more efficiently.

Before you begin

Role required: admin

Install the plugin for email interactions.

About this task

Sentiment analysis for email interactions is generated from the information that you enter in the following fields:

- Description
- Short Description

Any modifications to the names or labels of these fields can result in issues with sentiment analysis.

Sentiment is calculated using several factors:

- Latest requester message
- Overall conversation between agent and customer captured in transcript

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- Sentiment history (trend)
- Issue complexity
- Feedback or continued frustration at the end of conversation
- Frequency of updates and response time
- Language tone

The Sentiment Reasoning field in the record provides details on which factors were considered for reasoning. This includes:

- Tone of the requester's messages across the transcript.
- Feedback or continued frustration in the latest requester's messages.
- Complexity of the issue based on interactions from both the requester and the agent.

Procedure

1. Navigate to **Admin > AI Admin Hub > AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate skill for the **Sentiment analysis for email interactions** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and review the name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Choose Input** and review the tables and fields to create prompts that determines where data is pulled from.

   Note: You cannot modify the input data source.

   Table 1: Inputs for the Sentiment analysis for email interactions skill

Input	Description
Input table	Interaction
Input fields	○ Description ○ Short Description

6. Select **Role attribution**

   Note: You cannot modify the input data source in base system.

   Table 2: Inputs for the Sentiment analysis for email interactions skill

Input	Description
Input table	Interaction
Requester fields	○ Opened for ○ Created by
Fulfiller fields	Assigned to

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7. Select **Define Availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
8. Select **Define Trigger** and edit the job schedule frequency period to configure how often the skill will be triggered.

   To enable a scheduled job for a custom table, follow these steps:

   a. Navigate to **All** > **System Definition** > **Scheduled Jobs**.

   b. Search and select **Sentiment analysis scheduler job interaction CSM**.

   c. Replace the table name **interaction** with the name of your custom table in the script.

   d. Select **Update**.
9. Select **Save and continue**.
10. Select **Define access** to determine who can access this skill.

    By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

    Default and Custom Roles:
    - If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
    - If custom roles were added before the upgrade, they'll be updated automatically by a script.
    - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

      Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.
11. Select **Save and continue**.
12. **Select display** and toggle to determine if the skill appears in In-product desktop, displaying Sentiment analysis for email interactions in all CSM products.
13. Select **Save and continue**.
14. After selecting **Review and Activate** to examine changes, select **Done** to close the sentiment analysis generation settings.
15. Select **Activate** to turn on the skill for agents and complete the configuration.

What to do next

- AI Skill Kit is the ServiceNow framework for cloning and customizing AI skills. When configuring Sentiment Analysis for email interactions, the base table provides the core email record data. Additional inputs supply the LLM with broader context- such as email thread history, linked case fields, or customer contact data that can improve the accuracy of sentiment output.
- You can customize the email sentiment prompt. Follow the steps to customize:

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1. Access the OneExtend Capability Definition record by going to the sys_generative_ai_config table. Here is an example for Azure OpenAI (other providers like Claude and Gemini will have a different sys_id): https://anoway1.service-now.com/sys_generative_ai_config.do?sys_id=479cdabf93b48310003afba6dd03d606
2. Go to the **Prompt Template** field and edit the prompt.
3. **Save** the record.

> **Note:** Verify that the user is in ServiceNow Otto for Customer Service Management (CSM) scope and the record is still in **Published** state.

Related topics

Analyze sentiments in ServiceNow Otto for Customer Service Management (CSM)

Enable and configure the Sentiment Analysis

Configure Suggested Steps Generation

Configure suggested steps generation to analyze clusters of similar cases and suggest next steps for case resolution for accelerated and consistent agent case troubleshooting.

Before you begin

Role required: admin

Suggested steps are generated from the records identified based on the information that you enter in the following fields:

- Short Description
- Edited Conditions

Assess your case data before setup:

- Before activating Suggested Steps Generation, verify that your case data meets quality requirements. Poor data quality is the primary cause of setup failures and inadequate suggestions.
- Verify the following before beginning configuration:
  - Percentage of cases with populated Short Description field (target: 80%+)
  - Consistency of Edited Conditions usage across agents
  - Minimum of 2000 similar cases for effective clustering
  - Case data currency (verify historical data is recent enough to be relevant)
  - Special characters or formatting issues that could break parsing
- Don't proceed if:
  - Less than 50 cases match your use case
  - Short descriptions are very generic. For example, "Fixed" or "Case resolved"
  - Edited Conditions are inconsistently formatted or mostly empty
  - Cases span many unrelated product lines

Procedure

1. Navigate to *AI Admin Center* > *AI Admin Hub* > **AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Suggested Steps Generation** skill.

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Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.

4. Select **Choose Inputs** and review the tables and fields to create prompts that determines where data is pulled from.

   Note: You can't modify the input data source. However, you can refine which records are used by editing the Edited Conditions filter.

   Understanding Edited Conditions: Edited Conditions are structured troubleshooting steps or resolution details that agents enter when resolving cases. The Suggested Steps system uses these to identify common resolution patterns. You can filter Edited Conditions by:

   - Date range: "Created in last 6 months" (avoid stale cases)
   - Resolution status: "State = Resolved"
   - Assignment group: "Assignment group = Platform Support"
   - Severity: "Priority >= 2"

   Example Filter- "Created in last 6 months AND State = Resolved AND Assignment group = First Level Support AND Short_description NOT EMPTY"

   Inputs for the suggested steps generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	Short description
Filter conditions	Edited Conditions: Edit the conditions to update the filter and verify that only relevant and up-to-date records are used.

5. Select **Record Clustering** to group records by similarity based on the adjusted inputs in the previous step.

   Note: Record clustering allows you to add the job in the queue, providing you with the ability to leave the page while the task is running in the background. You will be notified when the task is complete.

   Expected Clustering Performance- Clustering times vary by case volume and instance load:

   - Minimum 2,000 cases: ~10-20 minutes
   - 5,000+ cases: 30+ minutes (runs as background job)

   If Clustering Fails- Common reasons and solutions:

   - Filter returns zero records → Broaden your Edited Conditions filter
   - Special characters in descriptions → Clean data or adjust NLP settings
   - Other background jobs running → Wait for completion or try again
   - Check logs: *AI Admin Hub* > **Logs** for detailed error messages

6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

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Default and Custom Roles:

- If no changes are made, the default role sn_customerservice_agent or sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
- If custom roles were added before the upgrade, they are updated automatically by a script.
- If custom roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

  Note: A role added in **Define Access** will not automatically appear in **Select Display**. You must manually select it in the next step.

  If agents can't see Suggested Steps after activation, verify:

  - Role is present in **Define Access** step
  - Role is toggled on in **Select Display** step
  - Agent has sn_gaf.data_writer role (required for skill access)
  - Recommended Actions widget is enabled in CRM Workspace
  - Clustering job completed successfully (check logs)
  - Clear browser cache and refresh case form
- For customizing access control, see Customize access control for suggested steps

7. Toggle **Display** to determine if suggested step recommendations appear in In-product desktop, displaying AI skills on forms and workspaces.
8. After selecting **Review and Activate** to examine changes, select **Done** to close the Suggested Steps Generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.

Trouble?

Common errors and troubleshooting

Error or symptom	Cause	Solution
No clusters generated	Edited Conditions filter is too restrictive	Broaden filter to capture at least 200+ cases
Skill appears inactive in AI Admin Hub	Skill configuration not saved after setup	Complete all 9 steps and select **Done**
Agents see "No suggestions available"	Insufficient similar cases or insufficient data	Re-cluster with broader filter
Suggested steps are outdated or irrelevant	Cluster includes very old cases	Add date filter: "Created >= 90 days ago"
Role added in Define Access but not visible in Select Display	Select Display must be configured separately	Add role in Select Display and toggle ON
Recommended Actions widget not visible	ACL permissions or form configuration issue	Verify sn_gaf.data_writer role + check widget enabled
Custom table suggestions not appearing	Widget data source not set to custom table	Verify table extends case table; check widget binding

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Common errors and troubleshooting (continued)

Error or symptom	Cause	Solution
GAF access denied error	sn_gaf.data_writer role not in role hierarchy	Add sn_gaf.data_writer to custom role Contains Roles list

Make suggested steps available on CRM Workspace

Learn how to enable the suggested steps generation in the CRM Workspace after skill activation.

Before you begin

After activating the Suggested steps generation feature in the AI Admin Hub, follow these steps to make the skill visible in CRM Workspace.

Verify these before proceeding:

- Recommended Action 1 widget exists on your instance
- UI Builder is accessible to administrators
- CRM Workspace has been provisioned

Role required: admin

Procedure

1. Navigate to **All** > **UI Builder**.
2. Go to **Experiences** > *`CRM Workspace`* > **Record** > **Front-line Case Page**.
3. In the left content navigation pane, scroll down and select **Recommended Action 1**.
4. In the right pane, clear the **Hide recommended actions** check box.
5. Select **Save** to apply the changes.

Result

After saving configuration, open a case record in CRM Workspace. Suggested Steps generation skill appears below the case form in the Recommended Actions section.

Trouble?

Configure Recommended Actions for custom tables

To enable Suggested Steps on custom case tables or extensions, configure the Recommended Actions widget in UI Builder.

Prerequisites for custom tables:

- Custom table must extend sn_customerservice_case
- Table must have Short Description and Edited Conditions fields or custom equivalents
- UI Builder experience must exist for the custom form

Configuration steps:

1. Navigate to **All** > **UI Builder**.
2. Go to **Experiences** > **[Your Custom Workspace]** > **Record** > **[Your Custom Form Page]**.
3. In the left pane, scroll to find Recommended Action widgets or add if missing.

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4. In the right pane, clear the **Hide recommended actions** check box.
5. Under Widget Settings, verify:
   - Recommended Actions data source points to your custom table
   - Binding context includes Short Description field
6. Select **Save**.

If Recommended Actions Widget is missing:

1. Navigate to **All** > **UI Builder** > **Experiences** > **[Your Workspace]** > **Record** > **[Your Form]**.
2. In the left pane, select **Add** > **Widgets** > **Recommended Actions** or **Recommended Action 1**.
3. Configure the widget data source to point to your custom table.
4. Test on the custom form to verify suggestions appear.

Troubleshooting

If suggestions aren't visible:

- Clear browser cache (Ctrl+Shift+Delete)
- Hard refresh the case page (Ctrl+F5)
- Verify your role is in the **Select Display** step
- Confirm the case is not excluded by Edited Conditions filter
- Check that Suggested Steps skill clustering completed under *AI Admin Hub* > **Logs**
- For custom tables: Verify table extends sn_customerservice_case
- For custom tables: Confirm widget data source is set to correct table

Customize access control for suggested steps

Replace the default sn_customerservice_agent and sn_customerservice.consumer_agent role with a custom role.

Before you begin

Role required: admin

About this task

For custom roles to access Suggested Steps and other AI-powered skills, proper Generative AI Framework (GAF) configuration is required. The `sn_gaf.data_writer` role is the base permission for all AI skill access and should be added to the Contains Role list for custom agent roles. don't assign this role directly to users.

Procedure

1. Add the GAF data writer role to your custom role
   In the sys_user_role table, open your custom role and add `sn_gaf.data_writer` to the Contains Role related list.

   Tip: The `sn_gaf.data_writer` role should always be inherited through an agent role such as `sn_customerservice_agent`, never assigned directly to users.

2. Identify GAF-related ACLs
   Navigate to the sys_security_acl table and filter where Name starts with `gaf_suggested_steps_csm`.

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Four matching ACL records appear.

3. Add your custom role to each GAF ACL
   For each of the four matching ACL records:
   a. Open the ACL record.
   b. In the Roles related list, add your custom role.
   c. Save the record.
4. Configure skill access in AI Admin Hub
   Complete the setup for the CSM Suggested Steps Generation skill:
   - In the **Define Access** step, add your custom role.
   - In the **Select Display** step, add the same custom role.

   ⚠ **Warning:** The `sn_gaf.data_writer` role includes `platform_ml_read` by default. Since `sn_gaf.data_writer` is assigned to agent roles like `sn_esm_agent`, those agents inherit `platform_ml_read` as well, which gives them broader access than intended. To avoid unintended access, never assign `platform_ml_read` directly to users.

5. **Optional:** Verify GAF access
   Test that your custom role has proper access:
   a. Assign the custom role to a test user.
   b. Log in as the test user and navigate to a case.
   c. Verify that Suggested Steps appear in Recommended Actions.

Result

Your custom role now has the same access to Suggested Steps as the default `sn_customerservice_agent` and `sn_customerservice.consumer_agent` roles.

What to do next

Before marking the Suggested Steps skill as complete and activating it for all agents, validate all aspects of the configuration.

Data readiness validation

Validation item	Expected result	Status
Case volume	200+ similar cases identified for clustering	# Pass # Fail
Short Description coverage	80%+ of cases have populated Short Description	# Pass # Fail
Edited Conditions consistency	Conditions are formatted consistently across cases	# Pass # Fail
Data freshness	Most cases created in last 6-12 months	# Pass # Fail
Special characters	No parsing-breaking characters in descriptions	# Pass # Fail

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Configuration validation

Configuration item	Verification step	Status
Choose Inputs	Verify Short Description and Edited Conditions selected	# Pass # Fail
Record Clustering	Clustering job completed successfully; check logs for errors	# Pass # Fail
Define Access	Custom role added to Define Access (or default role confirmed)	# Pass # Fail
Select Display	Same role toggled ON in Select Display (not just present)	# Pass # Fail
Role Permissions	Role includes sn_gaf.data_writer permission	# Pass # Fail
ACL Configuration	Role added to all 4 gaf_suggested_steps_csm ACL records	# Pass # Fail

Workspace configuration validation

Workspace item	Verification step	Status
Recommended Action widget	Widget exists in form; "Hide recommended actions" is unchecked	# Pass # Fail
Custom tables	If used: Widget data source set to custom table; extends case table	# Pass # Fail
Widget visibility	Test user sees Recommended Actions section on case form	# Pass # Fail

User access validation

Access check	How to verify	Status
Test user role	Confirm test user has assigned role	# Pass # Fail
Role inheritance	Verify role includes sn_gaf.data_writer via Contains Roles	# Pass # Fail
Skill activation	Confirm Suggested Steps skill shows "Activated" status	# Pass # Fail
Browser cache	Clear cache and hard refresh; suggestions still visible	# Pass # Fail

Suggested Steps quality validation

Quality check	Expected result	Status
Suggestions appear	Suggested Steps visible for test cases	# Pass # Fail
Suggestion relevance	Suggestions are relevant to the case context	# Pass # Fail
Suggestion consistency	Similar cases receive similar suggestions	# Pass # Fail
Suggestion freshness	Suggestions reference recent resolution patterns	# Pass # Fail

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Configure Sidebar Summarization

Configure sidebar summarization to generate summaries of sidebar discussions for quick agent understanding, allowing for faster collaboration.

Before you begin

Role required: admin

Sidebar summarization is generated from the information within selected tables containing specific case, incident, or interaction information.

Procedure

1. Navigate to **Admin > AI Admin Hub > AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate Skill for the **Sidebar Summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **Define triggers** and switch the toggles to choose how and when the summarization is configured.

   Table 1: Triggers for the sidebar summarization skill

Trigger	Description
Quick action	Sidebar summary that is generated when the live agent performs the `/summarize` quick action.

   You can also select toggle a property that controls how a sidebar summary is displayed.

   Table 2: Property for the sidebar summarization skill

Property	Description
Bulleted list	Sidebar summary as an unordered list.

5. Select **Choose tables** to select the tables from which summaries for Sidebar discussions are generated.

   Tables that are added in **Default Table Name** section, like the Case table and Task table are available by default, and are automatically populated. The default table names check boxes associated to the tables are pre-checked and inactive.

   Note: An admin can only select or deselect the tables added within the **Table Names** section.

   Any tables available by default or customized must be added to one of the **Choose tables** section based on the preferred configurations.

   - Table Names contains a list of all the table names that are required for the sidebar summarization skill.
   - Default Table Name only contains tables that you want pre-checked.

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- Enabled Table Names can have the same value as the Default Table Names and must be in **Active** state from the beginning.

  Note: The Default Table Names and Enabled Table Names are a subset of Table Names and can't be modified by the user.

Table 3: Tables for the sidebar summarization skill

Label	Name
Change Phase	change_phase
Change Request	change_request
IMAC	change_request_imac
Change Task	change_task
Chat Queue Entry	chat_queue_entry
Incident	incident
Incident Task	incident_task
Interaction	interaction
Knowledge Feedback Task	kb_feedback_task
Problem	problem
Problem Task	problem_task
Request	sc_request
Requested Item	sc_req_item
Catalog Task	sc_task
Standard Change Proposal	std_change_proposal

6. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_customerservice_agent or sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they'll be updated automatically by a script.
   - If new roles are created after the upgrade, you must manually add them in both the **Define Access** and **Select Display**.

     Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

7. Toggle **Select display** to determine if sidebar summarization appears in In-product desktop, displaying AI skills on forms and workspaces.

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8. After selecting **Review and Activate** to examine changes, select **Done** to close the sidebar summarization generation settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.

Configure Case Summarization

Configure case summarization to generate and display case summaries for agents and control who can access them in production.

Before you begin

Role required: admin

Case summarization relies on a base input table and its associated field inputs with descriptions to provide the context for a generated summary. Choose your base table, and view the associated base input fields within the provided input templates. Record state determines which input template is used when generating a summary.

Provided input templates:

- Case new
- Case work in progress
- Case resolved

Any modifications to the names or labels of the fields within these templates can result in issues with notes generation.

Procedure

1. Navigate to **Admin > AI Admin Hub > AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate skill for the **Case summarization** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Choose Input** and review the tables and fields to define the prompts that determine where data is pulled from.

   You can modify the rule conditions to determine when the input template is used. Additional data sources can be added via related tables as well.

Table 1: Inputs for the case summarization generation skill

Input template data	Base input field
Base input fields	○ Description ○ Short description ○ State ○ Work notes ○ Additional comments
Listed rule conditions to the input table	Default is determined by record state.

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Input template data	Base input field
#1 Additional data source: Related table	○ Task SLA -> Task ○ SLA definition ○ Stage ○ Breach time
#2 Additional data source: Related table	○ Case -> Parent ○ Number ○ Short description ○ State ○ Assigned to ○ Additional comments ○ Work notes
#3 Additional data sources	Activity is listed as 'Email.'

6. Select **Customize prompt** to evaluate the generated outputs of case summaries.
   Evaluate the prompt used for each of the input templates by selecting an existing record to test the output. The review and modify the prompt after evaluating the output results, edit it within the AI Skill Kit.
7. Select **Define availability** to customize how and when the skill capability is active and accessible.
   - Select **Skill is always available** so no restrictions are placed on when a skill is available.
   - Select **Customize skill availability** to define conditions and use the condition builder to configure fields and values.
8. Select **Define triggers** to determine how the skill will be triggered.
   - Select **Automatic** to see the case summary of a record automatically generated when the user lands on a record page.
   - Select **User trigger** to create a case summary of a record when the user opens a record page and selects the **Summarize** button.
9. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you are controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent automatically appear in **Define access** and **Select display**.
   - If custom roles were added before the upgrade, they're updated automatically by a script.
   - If new roles are created after the upgrade, you can manually add them in both the **Define access** and **Select display**.

   Note: In the **Select display** step, you can only choose roles that were added in the **Define access** step. If you add a role in **Define access**, you still must manually select it in **Select display** to make it active.

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10. Select **Display** to determine where the skill appears.
    - Select **In-product desktop** to display AI skills on forms and workspaces. Then, select the roles for whom the skill will be displayed.
    - Select *ServiceNow Otto* **panel** to display AI skills in the panel.
11. After selecting **Review and activate** to examine changes, select **Done** to close the case summarization generation settings.
12. Select **Activate** to turn on the skill for agents and complete the configuration.

Related topics

Summarize a call by using ServiceNow Otto for Customer Service Management (CSM)

Configure activity response generation

Set up the activity response generation skill in the AI Admin Hub console to enable automated responses in comments and work notes.

Before you begin

Role required: admin

About this task

Use the AI Admin Hub for configuring the activity response generation skill by selecting inputs, defining access, and activating the skill.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
   Access the skills configuration page.
   Verify you have admin role.
2. Select the **Customer** workflow and choose **CSM**
   This determines the product context for the skill.
   Workflow and product must match your configuration requirements.
3. Activate skill for the activity response generation skill.
   Each skill has a guided setup with multiple steps.
   A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and review name, description and details of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Choose Input** and review the input tables and fields to create prompts that determine where data is pulled from.

   Note: You can't modify the input data source.

   Inputs for the Activity response generation skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	Description, Short Description, Additional comments, Work notes, State, Priority.

6. Select **Define access** to determine who can access this skill.

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By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

Default and Custom Roles:

- If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent automatically appear in **Define Access** and **Select Display**.
- If custom roles were added before the upgrade, they're updated automatically by a script.
- If new roles are created after the upgrade, you can manually add them in both the **Define Access** and **Select Display**.

> **Note:** In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

7. Toggle **Select display** to determine if activity response generation skill appears in In-product desktop, displaying the AI skills on forms and workspaces.

   Additionally, verify the sn_customerservice_agent and sn_customerservice.consumer_agent role(s) you configured in the previous step.

8. Select **Review and Activate** to review the settings.
9. Select **Activate** to turn on the skill for agents and complete the configuration.
   Skill is activated for agents and a success modal shows up with the option to **Return to CSM** and to **ServiceNow Otto context menu**.
10. Select **Go to ServiceNow Otto context menu** to launch the guided steps for configuring the ServiceNow Otto context menu for the skill.

    You can also access this configuration from ServiceNow Otto Experience.

Related topics

Generate activity stream responses

Configure trending topics dashboard

Configure the trending topic dashboard to identify clusters of related records, visualize their volume and sentiment over time, and use AI-generated insights to resolve issues.

Before you begin

Role required: admin

Trending topics dashboard is generated from the information that you enter in the short description field.

> **Note:** Any modifications to the names or labels of these fields can result in issues with trending topics in the dashboard.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate skill for the **Trending topics dashboard** skill.

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Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.

4. Select **General details** and edit name and description of the skill.
   Additional information regarding details of the skill are displayed, but can't be edited.
5. Select **Cluster Input** and review the tables and fields to create prompts that determine the source from which the data is pulled.
   You can't modify the input data source.

Inputs for the trending topics dashboard skill

Input	Description
Input table	Case [sn_customerservice_case]
Input fields	Short description

6. Select **Record clustering** to group records by similarity based on the adjusted inputs in the previous step.
   Record clustering enables you to add the job in the queue, providing you with the ability to leave the page while the task is running in the background. You are notified when the task is complete.
7. Select **Define access** to determine who can access this skill.

   By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

   Default and Custom Roles:

   - If no changes are made, the default role sn_customerservice_manager automatically appear in **Define Access** and **Select Display**.
   - If custom roles were added before the upgrade, they're updated automatically by a script.
   - If new roles are created after the upgrade, you can manually add them in both the **Define Access** and **Select Display**.

   Note: In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

8. Toggle **Select display** to determine if trending topics dashboard skill appears in In-product desktop, displaying AI skills on forms and workspaces.
9. Select roles for whom trending topics dashboard are displayed.
   The user roles added in the **Define access** step for each ACL(access control list) can be selected in this step.
10. After selecting **Review and Activate** to examine changes, select **Done** to close the activity response generation settings.
11. Select **Activate** to turn on the skill for agents and complete the configuration.
    Skill is activated for agents.

Related topics

View trending topics dashboard

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Add a filter

Add a new filter to a UI Builder dashboard to enable users to refine data views based on additional fields such as consumer, product, or other custom fields.

Before you begin

Role required: admin or maint

If the Components tab in UI Builder is not available, run provided background script to enable the component view for maint users.

```
var gr = new GlideRecord('sys_properties');
gr.setValue("sys_scope", "e9b68250cdffe4e1c64e494026ec6e9a");
gr.setValue("name", "sn_cb_experiences.uib.enable.cb");
gr.setValue("write_roles", 'maint');
gr.setValue("value", "true");
gr.insert();
```

About this task

Filters allow users to refine dashboard data by specific fields. This procedure demonstrates how to add a filter to any base system dashboard such as trending topics dashboard or sentiment analysis dashboard. You can add filters by duplicating and configuring an existing filter carousel item.

Procedure

1. Navigate to **All** > **UI Builder** and select a UIB component.
2. Under **Components** tab search for the corresponding component.

   The different UI Builder Component names:

   - Trending topics dashboard: Default Trending Topics Dashboard, Top Trends, Trending topics by Field Insight (accounts, products, assignment group, channels), default Topic Details Dashboard, Topic Over Time Visualization, Topic Breakdown Visualization, Topic Affected Regions Visualization.
   - Sentiment analysis dashboard: Default Sentiment Analysis Dashboard, Sentiment Over Time Visualization, Sentiment Breakdown Visualization, Sentiment Top Drivers Insight (Negative sentiment and Positive sentiment drivers), Sentiment by Assignment Group Insight, Sentiment After Escalation Insight, Sentiment by Channel Insight.

   If working with the base system component, create a clone before making modifications.
3. Select a **Filter Carousel Item 2** in the component tree.
4. Duplicate the component from the context menu.
   Drag the duplicated filter to reorder it as needed within the carousel.
5. Select the newly created filter in the left panel.
   The configuration panel displays on the right side.
6. Under **Filter source**, change the **Table** name to **Trending topic record**.
7. Change the **Field** to your desired field.
   For example, enter **Consumer**.
8. Select **Apply**.
9. Under **UI element**, change the **Filter label** field to match your desired field name.
   For example, enter **Consumer**.
10. Rename the component ID to match the field using lowercase and dashes.
    For example, enter **filter_consumer**

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11. Copy this ID to the clipboard for use in subsequent steps.
12. Select **Apply**.
13. Select **Save**.
14. In the top left of the screen, open the hamburger menu and select **Open component record**.
15. In the **Composition** section, search for your component ID.
16. Open the search function using Cmd+F (Mac) or Ctrl+F (Windows).
17. Paste the component ID from step 10 using Cmd+V (Mac) or Ctrl+V (Windows).
18. Press Return (Mac) or Enter (Windows) to search.
19. Open the search function again using Cmd+F (Mac) or Ctrl+F (Windows).
20. Enter **filterId** in the search box.
21. Press Return (Mac) or Enter (Windows) to perform the search.
22. Locate the **value** field under the filterId property.
23. Change the final value to the filterId from step 10.

    For example, enter **filter_consumer**. The filterId can be any unique value.

24. Select **Update** to save.
    The new filter is now configured and ready to use on the dashboard.

Result

The new filter appears in the dashboard filter carousel and enables users to filter data by the specified field.

> **Important:** If you plan to make additional changes to the original component, refresh the UI Builder component page to prevent losing the changes made in steps 6-10.

Related topics

Change graph visualization

Change insight to use a different field for trending topics

Change graph visualization

Change a graph visualization to a different type within the same graph group, such as converting a bar chart or area chart.

Before you begin

Role required: admin or maint

About this task

This procedure allows you to change a graph to a different visualization type within the same group. The following are similar groups of graphs:

- Scores: Single score, Dial, Gauge
- Time series: Area, Column, Line, Scatter, Spline, Step
- Bars: Horizontal bar, Vertical bar, Pareto
- Pies and donuts: Donut, Pie, Semi Donut
- Multidimensional charts: Pivot table, Heatmap, Bubble

> **Tip:** Changing between graphs in the same group is very easy. For example, an area chart can be converted to any other time series chart such as spline, column, or line.

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Procedure

1. Navigate to **All** > **UI Builder**
2. Under **Components** tab select the corresponding component that contains the graph you want to change.

   For example, open **Topic Over Time Visualization**.

   If needed, create a clone of the component before making changes.
3. Select the graph on the left panel that you want to change.
4. Locate the **Data visualization type** field.
5. Change the graph type to a different visualization within the same graph group.

   Important: Ensure the new graph type is within the same group as the original graph type. Converting across different graph groups is very difficult and may require significant programming changes.

6. Select **Save**.
   The graph visualization type is updated and displays data in the new format.

Related topics

Change insight to use a different field for trending topics

Add a filter

Change insight to use a different field for trending topics

Change the field used in a trending topics insight to display data from a different field, such as changing from Assignment Group to Consumer or Product.

Before you begin

Role required: admin or maint

About this task

For trending topics insights, it is simple to change the field being analyzed. This procedure allows you to duplicate an existing insight and modify it to use a different field while preserving optimization and formatting.

The Trending topics dashboard uses different UI Builder Component names. These include default Trending Topics Dashboard, Top Trends, and Trending topics by Field Insight (accounts, products, assignment group, channels). Additional components include default Topic Details Dashboard, Topic Over Time Visualization, Topic Breakdown Visualization, and Topic Affected Regions Visualization.

Procedure

1. Navigate to **All** > **UI Builder**.
2. Under **Components** tab search for the corresponding component.

   For example, open **OOB Trending Topics Dashboard**. Make a clone if needed.

3. Select **Insight Carousel Item 1** and duplicate it.
   Drag the newly duplicated component to reorder as needed.
4. Select the component within the carousel item and on the right-hand panel, change the field to your desired field ID.

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5. Select **Save**.
   The insight now displays trending topics data based on the newly specified field.

Related topics

Add a filter

Change graph visualization

Configure trending topics dashboard

Automated quality assurance

Configure the Automated quality assurance skill to generate quality assurance scores and feedback for closed cases through automatic review based on defined scoring criteria.

Before you begin

Role required: admin

About this task

Add, configure, review, and activate the Automated quality assurance skill, including parameters, display options, and availability checks.

Note: In the base system, administrators can modify the display settings, role assignments, and add the custom parameters in the skill. All other fields are read-only. To customize additional settings, administrators must clone the skill first.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
2. Select the **Customer** workflow, and **CSM** as the product.
3. Activate skill for the **Automated quality assurance** skill.
   Each skill has a guided setup with multiple steps. A check symbol next to each step indicates whether its setup is complete, partially complete, or incomplete. After configuring a step, select **Save and continue** to move forward, or **Back** to return to a previous step.
4. Select **General details** and review the skill name and description.

   Note: You can't modify the input data source in the base system.

5. Select **Choose inputs** and review the input tables and fields to create prompts that determine where data is pulled from.
   When you activate the Auto QA base skill, the **short description**, **description**, **work notes**, and **comments** fields are pre-selected as input fields. These fields can't be customized.
6. Select **Define scoring parameters** to review the parameters and categories used to calculate the quality assurance score.

   Note: In the base system, you can only edit weights and can activate or deactivate parameters. An admin can add custom parameters to a skill directly, without cloning it. An admin can set the weights for each category and parameter to assign due importance in scoring.

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- Viewing Parameter Details

  a. Select any parameter to view its detailed scoring rubric. The rubric explains the evaluation criteria and scoring methodology for the parameter.

  b. You can search for parameters through the search option and also sort parameters based on their weights.

  c. Review the rubric to understand how interactions are scored for this parameter. The total weight across all the categories and parameters should add up to 100%. For example, If there are 9 categories and 21 parameters, having just one parameter turned on with 100% weightage meets the requirement.

List of parameters in base system

Category	Parameter	What it measures
Issue Understanding & Diagnosis	Root cause analysis	Agent identifies and explains the underlying cause — not just surface symptoms. Good agents explain why the problem occurred; weak agents restate what the customer said.
	Resolution completeness & actionability	Every part of the customer's question is addressed without gaps. Clear, step-by-step instructions the customer can follow immediately, matched to their technical level.
Communication Quality & Writing	Grammar & mechanics	No spelling errors, typos, grammatical mistakes, or punctuation problems. Measures basic writing correctness — not tone or style.
	Clarity & conciseness	Clear, direct language without jargon or redundancy. Good agents explain technical terms; weak agents ramble or write ambiguously.
	Tone & professionalism	Helpful, respectful tone even with frustrated customers. Good agents acknowledge concerns; weak agents blame the customer or use overly casual language.
	Formatting & readability	Response structured for easy scanning using numbered lists, bullets, and short paragraphs rather than walls of text.
Customer Empathy	Issue acknowledgment	Agent explicitly acknowledges the customer's concern or frustration early in the response before jumping to a solution.
	Personalization	Response uses the customer's name and references specific case or account details rather than a generic reply.
	Active listening signals	Agent paraphrases or references specific details from the customer's message, showing they absorbed what was said.
Knowledge Base Utilization	KB article sharing	Agent proactively shares relevant knowledge base articles or help docs with contextual explanations — not just generic links.

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Category	Parameter	What it measures
	Self-service enablement	Resources provided help the customer handle similar issues independently in the future.
	Proactive guidance	Agent anticipates related future issues and provides preventive information or best practices beyond what was explicitly asked.
First-Contact Resolution Intent	Complete resolution	Issue fully resolved in the first interaction without requiring follow-up. Good agents exhaust options within their scope before escalating.
	Information gathering efficiency	All necessary diagnostic info gathered upfront rather than asking piecemeal across multiple exchanges.
	Appropriate escalation	When escalation is needed, agent clearly explains why and sets realistic expectations for next steps and timeline.
Closing & Next Steps	Resolution confirmation	Agent confirms what was resolved and what happens next, rather than ending ambiguously.
	Timeline & expectations	Specific timelines provided for open or pending issues — not vague terms like "soon" or "as soon as possible."
	Professional sign-off	Polite, professional closing with a genuine offer to help with additional questions.

- Enabling or Disabling Parameters
  a. Locate the **Active** toggle or check box for the parameter you want to enable or disable.
  b. Toggle the parameter status: Enable the toggle to activate the parameter in quality scoring and disable the toggle to exclude the parameter from quality scoring. When you disable a parameter, the system prompts you to redistribute its weight among remaining active parameters. Adjust the weights of other parameters to verify that the total equals 100%. Weight redistribution is required because all active parameter weights must sum to 100% for accurate scoring.

- Adjusting Parameter Weights
  a. Select the weight field for any active parameter to edit it.
  b. Enter the new weight value as a percentage.
  c. Adjust weights for other parameters as needed to verify that the total equals 100%.

  Note: The system validates that active parameter weights sum to exactly 100% before permitting you to save changes.

7. Select **Define Availability** to review when the side panel on the dashboard is active and available to customize.
   Admins can customize availability and set specific conditions to enable the contextual side panel on the case record page. Alternatively, choose the default **Skill is always available** option to view the side panel for all cases. Select **Field** and **Value** to set conditions to define availability.
8. Select **Define triggers** to choose how a base skill is automatically triggered.

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When a case moves to the **Closed** or **Resolved** state the skill is triggered automatically.

9. In the **Enable dashboard** step, select the toggle in the **Quality assurance dashboard** to enable users to view the entire Auto QA dashboard.

   Note: As an admin, you can set conditions in the **Restrict access to the dashboard** fields to disable access to the dashboard to a select group of users. For example, you can restrict access to a group of users with a particular country code.

10. Select **Define access** to assign responsibilities and ACLs for user roles and groups that should have access the Auto QA dashboard.
11. Select **Display** to activate the skill and make it visible in the In-product desktop for specific roles.

    Note: The skill appears on forms and workspaces. By default, the skill is available to customer service managers and customer service agents' roles. Admins can deactivate the skill to hide it from managers and agents during testing the configuration accuracy.

12. Select **Review and Activate** to check the default setup and a summary of your selections. Admins can copy a skill and customize the configurations according to their business needs. You can also choose your **Base input fields** to be the case table or its child tables in the **Choose inputs** screen or add new base input fields.
13. Select **Save and continue.**
14. Select **Activate skill** to turn on the skill for agents and complete the configuration.
    Skill is activated for agents, and a success modal shows up with the option **Return to AI skills.**

Related topics

Use automated quality assurance dashboard as a live agent

Use automated quality assurance dashboard as a manager

Copy Automated quality assurance skill

Copy the Automated quality assurance skill to experiment with settings and configure it for your business needs.

Before you begin

Role required: admin or skill_manager

About this task

The skills that come with the AI applications have default configurations that are optimized to serve the most common use cases. If you want to change the skill settings, you can edit a skill with the AI Admin Hub or you can create a copy of the skill. Creating a copy leaves the original skill configuration intact in case that you want to use it later or want to create another copy from the original. You can activate and configure the copies of the skills by using the same guided setup as the default skills. This process verifies that all skill settings, parameters, and configurations are properly replicated before activation.

Note: In a default scenario, only one version of a skill can be active at a time. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
   If you're already in the AI Admin Hub, select the **AI Skills** tab.
2. In the navigation pane, select the **Customer** workflow, and **CSM** as the product.

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3. On the feature card that contains the default Automated quality assurance skill, select **Options** icon .
4. Select **Make a copy**.

Note:

- For skill copy, admin can edit the name and description. Once the skill is copied, by default you see (Copy) as a suffix. Only one version of a skill can be active at a time. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated.
- Cloning can also be done from AI Skill Kit.

Result
A copy of the Automated quality assurance skill is generated, and you're taken to the guided setup.

What to do next
Continue the steps in the guided setup to activate the skill. For more information, see Activate Automated quality assurance skill.

Edit Automated quality assurance skill

Edit the configuration of the Automated quality assurance skill to choose the inputs or parameters and display the location of the skill output.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
   If you're already in the AI Admin Hub, select the **AI Skills** tab.
2. In the navigation pane, select the **Customer** workflow, and **CSM** as the product.
3. On the feature card that contains the default **Automated quality assurance** skill, select **View details**.
4. In the **All available skills** or **Active skills** section, select the **Options** icon next to the Automated quality assurance skill that you want to configure.
5. Select **Edit**.
   - The first step in the guided setup for Automated quality assurance skill is displayed.
   - Each skill configuration has a number of steps shown in the guided setup. The exact steps vary from skill to skill. A symbol next to each step indicates whether the step is completed, partially completed, or not completed.
   - Some configuration options are read-only.
6. Proceed to the next step when you have finished configuring the current step by selecting **Save and continue**.

   You can return to a previous step by selecting **Back**.
7. Apply the new settings after reviewing your changes by selecting **Done**.

Result
The skill is activated with your preferred settings.

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Edit a parameter in the base system

Update the weight of a parameter and enable or disable it.

Before you begin
Role required: admin

About this task
Use the parameter editor to modify the weight of a selected parameter. You can activate or deactivate the parameter, but all other details are read-only.

Procedure

1. In the **Define scoring parameter** step, select a parameter to edit.
   The parameter details appear in the edit panel.
2. Edit the Weight field.
   Enter a new numeric weight value to adjust the parameter's impact.
3. To enable or disable the parameter, select or clear the **Active** check box.
   Enabled parameters are included in scoring. Inactive ones are ignored.
4. Review the remaining fields.
   All other fields are read-only and can't be modified.
5. Select **Save**.
   You see an alert confirming that the parameter has been saved and updated.

Result
The parameter is updated with the new weight and activation status.

Add custom parameter to an existing custom category

Create and save a custom parameter within a category that supports custom parameters.

Before you begin
Role required: admin

About this task
Use this procedure to add custom parameter to an existing custom category. All fields in the form must be completed before saving.

Note: You can't add custom parameters to the base system categories.

Procedure

1. In the **Define scoring parameter** step, select **Add new** > **Parameter** to add parameter.
2. In the pop-up window, select the radio button **Add parameter** to existing category.
3. Enter a **Category**.
   Only custom categories are available in the category drop-down. The error message is seen at field level as soon as the user types a parameter name that is the same as other parameters.
4. Fill in all the required form fields for the new parameter.
5. Select **Save**.

Result
The new custom parameter is added to the selected custom category. You get a confirmation message confirming the action.

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Add custom parameter to a new category

Create a custom category and add a custom parameter to it.

Before you begin

Role required: admin

Procedure

1. In the **Define scoring parameter** step, select **Add new** > **Parameter** to add parameter.
2. In the pop-up window, select the radio button **Create new category & add parameter** to existing category.
3. Enter a category name and a short description.
4. Select **Next**.
5. Add new parameter details to the new category.
   The error shows at field level as soon as the user types the name that is the same as an existing parameter.
6. Select **Save**.

Result

The new parameter is added to the newly created category. You get a confirmation message that a new category and parameter are added.

Edit a custom parameter

Modify an existing custom parameter by editing it and resolving naming conflicts if needed.

Before you begin

Role required: admin

Procedure

1. In the **Define scoring parameter** step, select a custom parameter to open it for editing.
2. Edit any field as needed.
   For example, you can edit the **Exclusion criteria**. Parameters are grouped under categories. If the parameter name isn't unique, you see the error message: 'Parameter name exists. Choose a unique name.'
3. Select **Save**.

Result

The custom parameter is updated and saved successfully.

Add new category

Create a category by entering the required details and saving the record.

Before you begin

Role required: admin

About this task

Use this task to create category by entering all the required fields. Only applicable for Cloned skill. Admin isn't permitted to add category for the base system skill.

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Procedure

1. In the **Define scoring parameter** step, select **Add new** > **Category**.
   The system displays the form for adding a category.
2. Enter a value in the **Name** and **Short description** fields.

   Note: The name must be unique. Duplicate names trigger a warning message.

3. Select **Save**.
   The system validates the new category information.

Result

If validation is successful, the category is added to the category list. If validation fails, the system displays error messages that must be corrected before saving again. The new category appears in the category list.

Edit custom category

Update the details of an existing custom category when changes are required.

Before you begin

Role required: admin

About this task

Use this task to edit an existing custom category. You can modify all category fields. Only applicable for cloned skill. The admin isn't permitted to edit a new category for base system skill.

Procedure

1. In the **Define scoring parameter** step, select a custom category to edit.
   The system opens the selected category record in a modal form.
2. Update the value in the **Name** field.
   The name must be unique. Duplicate names result in a warning message.
3. Modify any additional fields as needed.
   All fields in a custom category are editable. Verify that all changes conform with field-format requirements shown in the form.
4. Select **Save**.
   The system validates the updated category information.

Result

If validation succeeds, the category is updated in the category list. If validation fails, the system displays error messages that must be corrected before saving again.

Configure special handling notes summarization in ServiceNow Otto for Customer Service Management (CSM)

Activate the Special Handling Notes summarization skill to enable ServiceNow Otto for CSM to generate concise summaries of special handling notes on the **Case Insights** section.

Before you begin

- The ServiceNow Otto for Customer Service Management (CSM) plugin is activated in your instance.
- A valid ServiceNow Otto® license is applied to your instance.

Role required: admin.

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About this task

The Special Handling Notes summarization skill uses generative AI to condense lengthy or multiple special handling notes on a customer into a brief, actionable summary. When activated, agents can view this summary directly on the **Case Insights** section, which helps agents understand customer-specific handling requirements before engaging with a customer.

Procedure

1. Navigate to **Admin** > **AI Admin Hub** > **AI Skills**.
2. Select the **Customer** workflow and **CSM** as the product.
3. Search for the **Special handling notes summarization** skill.
4. Select **Turn on**.
   The **Turn on Special Handling notes** panel opens.
5. Configure user access.

   In the **Add user access** section, specify the individuals or groups that can use this skill. ACLs (access control lists) identify the users permitted to access the skill.

   a. Review the **Decision type** column.
      The value is set to **Allow if** by default.

   b. Review the **Roles** column.

      By default, the following roles are assigned:

      - `sn_customerservice.consumer_agent`
      - `sn_customerservice_agent`

   c. To edit the roles, select the pencil icon at the end of the row and update the role assignments as needed.

6. Set role restrictions for the skill.

   In the **Role restrictions to skill** section, define which data and resources (for example, tables and APIs) the skill can access when invoked. These restrictions apply whenever the skill is triggered.

   a. Review the roles listed under **Roles**.

      By default, the following roles are populated:

      - `sn_customerservice_agent`
      - `sn_customerservice.consumer_agent`

   b. Add or remove roles as required by your instance data access policy.

7. Select **Turn on** to activate the Special handling notes summarization skill.

Result

The Special Handling Notes summarization skill is activated. Agents working in the CRM Workspace can view AI-generated summaries of special handling notes on the **Case Insights** section, which supports more consistent customer interactions. Role restrictions control which users and data resources the skill can access.

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What to do next

After activating the skill, complete the following tasks:

- Test the summarization output on a sample record that contains multiple or lengthy special handling notes.
- Notify CSM agents that the feature is available and direct them to the **Case Insights** section to review summaries.
- Monitor AI usage analytics to track adoption of the skill.
- To customize the skill, go to AI Skill Kit and open the skill and create custom prompts. For more info, see Create a prompt

Configure Customer summarization in ServiceNow Otto for CSM

Turn on the Customer summarization skill in ServiceNow Otto for CSM and configure user access and role restrictions to control who can use the skill and what data it can access.

Before you begin

Before turning on the Customer summarization skill, verify that the following prerequisites are met:

- You have the admin role.
- The ServiceNow Otto for Customer Service Management (CSM) plugin is activated in your instance.
- A valid ServiceNow Otto for CSM license is applied to your instance.

Role required: admin

About this task

When turning on the Customer summarization skill in CSM, you can specify who has access to the skill and add role restrictions to help avoid unauthorized data access.

Procedure

1. Navigate to **Admin** > **AI Admin Hub** > **Skills**.
2. Select the **Customer** workflow.
3. Search for the **Customer summarization** skill.
4. Select **Turn on**.
   The *`Turn on Customer summarization`* panel opens.
5. **Optional:** Configure user access in the **Add user access** section.

   (Optional) This section specifies the individuals or groups that can use the skill. ACLs (access control lists) identify the users permitted to access the skill.

   a. Review the **Decision type** column.
      The value is set to **Allow if** by default.

   b. Review the **Roles** column.

      (Optional) By default, the following roles are assigned:

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- `sn_customerservice.consumer_agent`
- `sn_customerservice_agent`

c. Edit the roles by selecting the pencil icon and updating the role assignments as needed.

6. Set role restrictions for the skill in the **Role restrictions to skill** section.

   This section defines which data and resources, such as tables and APIs, the skill can access when invoked. These restrictions apply whenever the skill is triggered.

   a. Review the roles listed under **Roles**.

      By default, the following roles are assigned:

      - `sn_customerservice_agent`
      - `sn_customerservice.consumer_agent`

   b. Add or remove roles as required by your instance data access policy.

7. Select **Turn on** to activate the Customer summarization skill.
   To discard your changes instead, select **Cancel**.

Result

The Customer summarization skill is turned on. Agents can use the skill in the **Case insights** card. Role restrictions take effect after saving, controlling which users and data resources the skill can access.

What to do next

- Confirm that the skill status shows as **Active** on the skill card.
- Test the summarization output on a sample record.
- Notify ServiceNow Otto for CSM agents that the feature is available.
- To customize the skill, go to AI Skill Kit and open the skill and create custom prompts. For more info, see Create a prompt

Additional skill input and trigger information

Enable remaining Generative AI Skills within ServiceNow Otto for CSM, and reference summarized details to complete setup.

Overview of skills and triggers

Depending on the selected skill, you can configure inputs or triggers. These settings determine how and when 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 case summary. A trigger initiates an action, such as when the system generates a chat summary.

Sidebar discussion summarization skill

For the sidebar discussion summarization skill, select the triggers that determine when a sidebar discussion summary is generated.

The following table lists the triggers that determine when a sidebar discussion summary is generated.

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Triggers for the sidebar discussion summarization skill

Trigger	Description
User triggered	Sidebar discussion summarization that is generated when the agent manually triggers the skill.

Case sentiment analysis skill

The case sentiment analysis skill includes the inputs and outputs that identify the table and fields that are used when a case sentiment is generated.

The following table lists the inputs for the case sentiment analysis skill.

Inputs for the case sentiment analysis skill

Input	Description
Input table	Case [Case]
Input fields	• Short description • Description • Priority • State • Task creation date • Activities • Task SLA

The following table lists the outputs for the case sentiment analysis skill.

Outputs for the sentiment analysis skill

Output	Description
Sentiment values	• Very positive • Positive • Neutral • Negative • Very negative
Sentiment trend	• Improving • Declining • Stable
Sentiment reasoning	Reasons for provide the sentiment value.

The following table lists the scheduled job for the sentiment analysis skill

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Scheduled job for the sentiment analysis skill

Scheduled job name	Default value	Description
Sentiment analysis scheduled job (case)	True	Refreshes sentiments on the Trigger frequency screen for the Sentiment analysis skill.
Update sentiment historical records	False	When active, calculates sentiment and sentiment trends for historical records.

Suggested steps generation skill

The following table lists the suggested steps generation skill

Inputs for suggested steps generation skill

Input	Description
Input table	sn_customerservice_case
Input field	Short description The skill uses this field to cluster cases based on similar cases closed in the past.
Conditions	Filter conditions to generate the suggested steps. Similar cases closed or resolved within the last 6 months are used by default to create the case clusters.

Configure service recommendations for interactions

Configure the service recommendations for interactions skill in the AI Admin Hub console to streamline case creation. This skill reduces cognitive effort, saves time, and promotes accurate case routing.

Before you begin

Role required: admin

About this task

Use the AI Admin Hub console for configuring the service recommendations for interactions skill by specifying the roles permitted to use the skill and the role restrictions.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Skills**.
   Access the skills configuration page.
   Verify you have admin role.
2. Select the **Customer** workflow and choose **CSM**
   This determines the product context for the skill.
   Workflow and product must match your configuration requirements.

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3. Select **Turn on** to activate skill for the service recommendations for interactions skill.
4. Select **Add user access** to determine who can access this skill.

   Default and Custom Roles:

   - If no changes are made, the default roles `sn_csm_case_types.service_definition_viewer`and `sn_esm_agent` automatically appear in **Add user access**.
   - If custom roles were added before the upgrade, they're updated automatically by a script.
   - If new roles are created after the upgrade, you can manually add them in **Add user access**.
5. Configure role restrictions to define which data and resources the skill can access when invoked (default: `sn_csm_case_types.service_definition_viewer`).
6. Select **Turn on** to activate the skill.
   A screen appears showing **Successfully activated**.
7. Select **Back to skills** to return to the skills menu.

What to do next

Clone the skill to ground it in your environment for your specific needs.

Related topics

Clone the ServiceNow Otto for CSM skills

Customizing a ServiceNow Otto for CSM skill

AI Guardian CSM filters

Activate base system AI Guardian CSM filters to automatically detect sensitive content in case conversations using the emotional tone of the message.

Before you begin

Role required: admin

- ServiceNow Otto for CSM must be enabled in your environment.
- Virtual Agent must be configured with topics for handling sensitive content scenarios.

About this task

Guardian filters analyze case conversation content using AI's sentiment analysis engine and detect sensitive or high-risk content. When a filter detects content matching its configured criteria, it redirects the user to a Virtual Agent topic to handle that type of sensitive issue. AI Guardian filters for CSM identify cases that contain sensitive content such as data breaches, legal threats, or reputational risks. By activating these filters, you can confirm that cases involving critical issues are flagged and handled appropriately, reducing response times and improving risk mitigation.

Filter name	What it detects	Example use case
Active Data Loss or security breach- Refers to issues related to security incidents that can put sensitive data at risk. It can include questions about ongoing security incidents, confidential information, or personally identifiable information.	Content indicating unauthorized data access, data ex filtration, or active security incidents	Customer reports that their account credentials were exposed in a third-party breach
Threatening legal action- Refers to issues that may arise in business-to-business or business-	Language suggesting	Customer states they will contact

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Filter name	What it detects	Example use case
to-customer interactions related to legal action. It includes any threats to sue and questions related to past and present litigation.	the customer intends to pursue legal remedies or regulatory complaints	their attorney or file a complaint with regulatory authorities
Reputational incident/issue- Refers to issues related to the reputation of either the service provider or the customer. It includes any content that could be perceived as harmful to the reputations of either party.	Content that could damage the organization's public image or brand reputation	Customer threatens to share negative experiences on social media or with industry publications

Procedure

1. Navigate to `https://<instance-name>.service-now.com/now/now-assist-admin/filters`.
2. Locate the filter you want to activate in the filter list.
   There are 3 filters available- **Active Data Loss or security breach**, **Threatening legal action**, **Reputational incident/issue** to choose from.
3. Select **Activate**.
4. In the **General details** step, review or edit the filter name and description if needed.
   - **Filter name**: The display name shown in the admin interface
   - **Description**: Explanation of what the filter detects
   - **Filter group**: Edit priority order for the filter in each given filter group it belongs to
5. Select **Save and Continue**.
6. In the **Sample phrases** step, add example phrases that the filter should detect.
   - Enter phrases that represent the type of content you want to identify.
   - Add multiple sample phrases to improve detection accuracy.
7. Select **Save and Continue**.
8. In the **Applicability** step, select which Virtual Agents this filter applies to.
   You can apply the filter to one or more Virtual Agent configurations.
9. Select **Save and Continue**.
10. In the **Filter topic** step, review the Virtual Agent topic that users will be redirected to when sensitive content is detected.

    Tip: Select **Preview topic in Virtual Agent** to customize the redirect topic in Virtual Agent Designer.

11. Select **Save and Continue**.
12. In the **Review and activate** step, review all configurations.
13. Select **Activate** to enable the filter.

Result

The filter is now active and will detect sensitive content in case conversations for the selected Virtual Agents. When matching content is detected, users are redirected to the configured Virtual Agent topic.

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What to do next

Test the filter by creating a test case with sample phrases that should trigger detection. Monitor filter performance and adjust sample phrases as needed to improve accuracy.

Related topics

AI Guardian

Banners in ServiceNow Otto for Customer Service Management (CSM)

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

Overview of banners

The generative AI banner displays information about the fields on a form that are generated or predicted by the skills available with ServiceNow Otto for Customer Service Management (CSM). Messages that appear in the banner:

- 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 can't be generated or predicted.

Messages also include links to the fields that are generated or predicted by ServiceNow Otto for Customer Service Management (CSM).

Links to generated or predicted fields

Messages displayed in the generative AI banner can include links to the fields that are generated or predicted by AI. For case records, this includes fields such as the case description and short description. For interaction records, this includes fields such as the short description and chat summary.

When an agent selects a link in the message, that field is highlighted on the form. If an agent modifies the field and saves the record, the link to that field is removed from the message. Restoring the field to the original value returns the link to the message.

Setting default record pages

A record page provides the base structure for how a record is displayed in CRM Workspace. When the system displays information in CRM Workspace, such as case records and interactions, it uses the pages that have been set as the default record pages.

Set the following pages as the default record pages in UI Builder:

- **CSM default record page**: Includes specific features for case management.
- **CSM Interaction record page**: Includes CSM specific features for interaction management.

These pages support the ServiceNow Otto for Customer Service Management (CSM) functionality in CRM Workspace, including the display of the generative AI icon and banner. For more information, see Set record page order.

Configure Propose Solution actions

Add generative AI-specific functionality to the Case form by configuring the Propose Solution UI action and declarative action that are included with the ServiceNow Otto for Customer Service Management (CSM) application.

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Before you begin
Role required: admin

About this task
The Customer Service Management application includes a Propose Solution UI action that agents can use to propose a solution for a customer service case.

The ServiceNow Otto for Customer Service Management (CSM) application includes the following actions that provide generative AI-specific functionality. Agents can use these actions to propose solutions that include AI-generated resolution notes:

- Propose Solution declarative action: Generates resolution notes in CRM Workspace.
- Propose Solution UI action: Generates resolution notes in Core UI.

Note: These actions are inactive by default.

To use the generative AI functionality, you must deactivate the Propose Solution UI action for Customer Service Management and then activate the Propose Solution UI action and declarative action for ServiceNow Otto for CSM. After being activated, these actions are available to customer service agents for assigned cases that are in the Open state.

Procedure
1. Deactivate the Propose Solution UI action for the Customer Service Management application.

   a. Navigate to **All** > **System Definition** > **UI Actions** to display the UI Actions list.

   b. Configure the list to show the Application column.
   For more information on how to configure a list, see Configure the list layout.

   c. Filter the list to display **Propose Solution** in the **Name** field.

   d. Select the Propose Solution UI action for the Customer Service application.

   e. Clear the **Active** check box.

   f. Select **Save**.
   The system returns you to the UI Actions list.

2. Activate the Propose Solution UI action for the ServiceNow Otto for CSM application to use this functionality in Core UI.

   a. From the UI Actions list, select the Propose Solution UI action for the ServiceNow Otto for CSM application.

   b. Select the **Active** check box.

   c. Select **Save**.
   The system returns you to the UI Actions list.

3. Enable the Propose Solution declarative action for the ServiceNow Otto for CSM application to use this functionality in CRM Workspace.

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a. Navigate to the **sys_declarative_action_assignment.list** to display the Action Assignments list.

b. In the Action label column, select **Propose Solution**.

c. Enable the **Active** check box.

d. Select **Save**.
The system returns you to the Action Assignments list.

Customize a case summarization skill in ServiceNow Otto for Customer Service Management (CSM)

If you have the admin role, you can customize a ServiceNow Otto for Customer Service Management (CSM) skill so that agents can use the generative AI skills in CRM Workspace and in Core UI.

Before you begin

Role required: admin

About this task

From the AI Admin Hub, you can select the input table, related records, and fields for each input template of the case summarization skill. You can then configure the prompt headers to include them in the general summary.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Features** to access the **AI Features** tab of the AI Admin Hub.
2. In the **Customer** workflow group, view the skills for the ServiceNow Otto for CSM features.
3. Activate and copy the ServiceNow Otto for CSM 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 that you would like to activate and select **Activate skill**.

   > **Note:** Only one version of a skill can be active at a time for each table. If you create and activate a copy of the skill, any previously activated version of the skill is deactivated. The copied skill can be activated with the parent 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.

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4. In the General details step, fill in the fields.
   For information about the inputs and triggers for each skill, see Additional skill input and trigger information.
   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.

   You can change the base input table and add case extension tables for the copied skill. To create an extended table, select **New** on the Tables list page, and select the table to extend from the **Extends table** search field. This option is only available when you're creating a table. It incorporates all of the fields of the original table and creates system fields for the new table.

   Configure the base input table fields and related lists for the different input templates (Case new, Case work in progress, or Case resolved states) for the skill.

   Each skill relies on a base input table and input fields with descriptions to provide context for the 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 state (New, Work in progress, or Resolved), select **+New base input field** and configure the base input table fields.

      Add multiple base input fields, as necessary.

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

   b. For each input template state (New, Work in progress, or Resolved), 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 LLM service uses.

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

      The following table lists the input template states.

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Input template states

State	Description
New	State is New.
Work in progress	State is Work in Progress.
Resolved	State is Resolved.

c. For each input template state (New, Work in progress, or Resolved), 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 LLM service in a related list.

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

   The selection of the related table fields may have a direct impact on the quality of the corresponding prompt header. For example, if a prompt header requires a specific field from the related table, but that field isn't selected as input, the summary for that prompt header will contain missing information. For example, as a base case, you see one related table, such as a Service level agreement (SLA), that includes all the required fields and filtering conditions for the prompt header. The SLA prompt header is preselected to help you understand how the related table, its fields, and the prompt header work together to produce a summary. You can use the SLA as a reference to configure the other related tables to determine which fields to select and which description adds the requirements of their respective prompt headers. Apply any additional conditions to filter the data further.

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

6. Customize the prompt.

   Review and test the default prompt provided. The prompt is fixed and can't be customized directly within this step or from the AI Admin Hub screen.

   To customize or create prompts, select **Edit prompt in** *`AI Skill Kit`*. This will redirect you to the AI Skill Kit, where you can manage prompt configurations for the skill. For more info, see AI Skill Kit

   a. For each input template state (New, Work in progress, or Resolved), select the prompt to include in the generated summary.
   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**.
   d. Select **Save and continue** to go to the next step.

7. 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.

8. Select **Define access** to determine who can access this skill.

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By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

Default and Custom Roles:

- If no changes are made, the default roles sn_customerservice_agent and sn_customerservice.consumer_agent will automatically appear in **Define Access** and **Select Display**.
- If custom roles were added before the upgrade, they'll be updated automatically by a script.
- If new roles are created after the upgrade, you'll need to manually add them in both the **Define Access** and **Select Display**.

> **Note:** In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still need to manually select it in **Select Display** to make it active.

9. Configure where to display the case summarization.

   a. Select either **In-product** or *`ServiceNow Otto`* **panel**.

      - **In-product**: When selected, the AI 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.

      - *`ServiceNow Otto`* **panel**: When selected, the AI skills are available in the panel.

        If you don't see this option, you must activate the ServiceNow Otto panel. For more information, see Activate the panel.

        For the skills that appear in the 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.

10. 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.

Domain separation in ServiceNow Otto for Customer Service Management (CSM)

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.

Setting up domain separation for ServiceNow Otto for CSM involves requesting activation of a plugin, setting options, and assigning users and records to domains.

Domain separation is possible at the skill level and at the individual configuration level. When using the guided setup in the AI Admin Hub console, each configuration option has its own record that you can separate by domain. To create a record in a different domain, you must set up the skill in the scope of your preferred domain.

Global domain is the default domain, and all new domains are created under it. New domains inherit the settings from the global domain if users don't override the settings in the new domain.

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Do the following task to set up domain separation:

1. Request domain separation. For more information, see Request domain separation.
2. Create a domain by creating an account for CSM
3. Configure skills in the domain for ServiceNow Otto for CSM.

More information

- Domain separation setup and administration. See Domain separation setup and administration.
- Benefits of domain separation. See Benefits of domain separation.
- Domain separation and Customer Service Management (CSM). See Domain separation and Customer Service Management.

Create a domain by creating an account for ServiceNow Otto for Customer Service Management (CSM)

Create a domain by creating an account in the account table in the Customer Service Management (CSM) application. By creating an account, you also create a domain. If you have the admin role, you can create multiple domains by creating different accounts as needed.

Before you begin

Role required: admin

About this task

Enable the *csm_auto_account_domain_generation* system property. This system property is installed with the CSM application and is available only after the domain separation plugin is active. When this property is enabled (the value is set to True), the CSM application automatically creates a domain of the same name when a new account is created.

Note: Enabling this property doesn't add domains for existing accounts. It only creates the domains for new accounts. Adding domains for existing accounts requires a migration script.

When creating a domain, follow these general guidelines:

- Only one domain can be the default domain.
- Only one domain can be the primary domain.

Procedure

1. Change the current domain to the domain that you want by selecting the domain under the domain scope.
   For example, if you want to create a domain under the global scope that would inherit its settings by default, select the global domain in the domain scope. If you want to create a child domain under a specific parent domain, change the domain scope to that parent domain.
2. Navigate to **All** > **Customer Service** > **Customer** > **Accounts** or **All** > **customer_account.list**.
3. In the Accounts table, create an account by selecting **New**.
4. Create a domain with the same name as the account by selecting **Save**.
   For example, when you create an account named ParentDomain under the global scope, you also create a domain with the same name. All the domains that are created under the global scope will be under the TOP (top level) domain. If you create an account called ChildDomain within the ParentDomain domain, the domain with the same name is also created under the ParentDomain domain.
5. Navigate to **All** > **Domain Admin** > **Domains**.

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The domains can be viewed in the Domain table, or you can directly create a domain in the Domain table.

Domain form

Field	Description
Name	Unique name for the domain.
Type	Domain type that describes the domain. By default, the domain types are Vendor, Customer, and MSP. You can also add your own choices.
Primary	Option to select if this domain is to be the top-level domain in the hierarchy. The top-level domain only has child domains and no parent domains.
Default	Domain that is to be the default domain for your hierarchy.
Parent	Name of the domain that is higher in the hierarchy. This field must have a value for the domain to appear in the domain map.
Active	Option to make the domain available for use. You must select this option for this domain to appear in the domain map.
Description	Description for the domain.

Each domain record can also have several related records:

- Companies
- Contains Domains
- Contained By

6. Create a domain in the Domain table by selecting **New**.
7. Add the field values and select **Submit**.
   The domain has been created.
8. Create users in the Users table under each domain.
9. After adding the field values, select **Submit**.
10. Assign the appropriate roles and groups to the users.
    For example, if you create an Agent user in the ParentDomain, they have access to both the ParentDomain and ChildDomain. However, an Agent user that you create in the ChildDomain only has access to the ChildDomain.
11. Select **Save**.

What to do next

To change the domain hierarchy, go to the Contains Domains related list. Select the domain records that are the child (contained) domains of the contained relationship.

Configure skills in a domain for ServiceNow Otto for Customer Service Management (CSM)

Activate the skills with different skill configurations in each domain in the ServiceNow Otto for Customer Service Management (CSM) application.

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Before you begin
Role required: admin

About this task
By default, the skill configurations in the domains inherit the settings from the global domain unless they're overridden by the new configurations in that domain.

Procedure

1. Change the current domain to the domain that you want to activate the skills in by selecting the new domain.

   For example, if you want to configure the skill in ParentDomain, change the domain scope to ParentDomain.

2. Navigate to **All** > **AI Admin Hub** > **Features** > **Features**.
3. In the AI Admin Hub console, select the global skill configuration to activate it within the current domain and to set up its own unique skill configuration.
   As shown in the following example, a modal pop-up window confirms that the skill configuration is being edited in the current domain. This action creates a skill configuration that overrides the existing global configuration. The active skill configuration in use is derived from the global domain and shares the same name as the global skill configuration.
4. Proceed to the guided setup by selecting **Yes, edit**.
   The configuration setup applies to the current domain and is inherited by its child domain. The name of the skill changes to <Skill Name> for <Domain Name>. For example, if the skill configuration - Case summarization for ParentDomain is activated, it overrides the global setting and applies to both the ParentDomain and ChildDomain. However, if the skill configuration Case summarization for ChildDomain is activated in ChildDomain, it only applies to ChildDomain.

   Note: The activation order must follow Global > Parent domain > Child domain to ensure a proper inheritance and overrides. If the child skill configuration in the child domain is activated before the parent domain, the parent skill configuration can't override the existing skill configuration in the child domain. Consequently, both the parent skill and the child skill remain active in the child domain and the result is a misconfiguration.

   More information about domain separation for CSM can be found in Domain separation and Customer Service Management

Configure ServiceNow Otto for Customer Service Management (CSM) in Virtual Agent

Use ServiceNow Otto for CSM in Virtual Agent to provide users a content-driven generative AI experience.

Before you begin
Role required: admin

To confirm LLM-based appointment booking works in Customer Service Management, the following apps are required:

About this task
There are 6 main steps to configure ServiceNow Otto for CSM in Virtual Agent:

1. Activate Virtual Agent for Customer Service Management (CSM).
2. Configure AI in Virtual Agent.
3. Install Conversational Appointment Booking.

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4. Enable Walk-up Experience Appointment Booking.
5. Configure API credentials for OpenAI.
6. Enable Schedule a Walk-up Appointment topic in the Virtual Agent.

Procedure

1. Navigate to **All** > **Conversational interfaces** > **Virtual Agent** > **Designer**.
2. Locate and select **Schedule a Walk-up Appointment** topic under LLM.
3. Select the **Properties** tab.
4. Locate the check box labeled AI for Virtual Agent under Select LLM assistant to make topic available.
5. Select **Save**.
6. Select **Publish**.

Result

The topic is available and active in the chat window.

Customize access control for conversational flows

You must define an access control list (ACL) for conversational flows. An ACL enables you to restrict who is able to access and execute a skill to only users with the correct role.

Before you begin

Role required: admin

The following flows include default ACLs for the sn_esm_agent role:

- Add Comment to Task
- Add Work Note to Task
- Create Task for Case
- Reassign Case

Note: An Access Control List (ACL) is already configured for these flows. The steps outlined below are only required if the customer intends to use these flows with a custom role.

To assign a custom role, follow the procedure:

Procedure

1. Navigate to **sys_security_acl** table.
2. Filter by these ACL names:
3. Add your custom role to each ACL record.

Clone the ServiceNow Otto for CSM skills

Clone an AI skill to experiment with settings and configure it for your business needs.

Role required: admin

The skills that come with the AI applications have default configurations that are optimized to serve the most common use cases. If you want to change the skill settings, you can edit a skill

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with the AI Admin Hub console or AI Skill Kit and you can create a copy of the skill. Creating a copy leaves the original skill configuration intact in case you want to use it later or want to create another copy from the original. You can activate and configure the copies of the skills by using the same guided setup as the default skills.

Use AI Skill Kit to create and publish custom prompts and skills for ServiceNow Otto for CSM, including the cloned skills from AI Admin Hub console.

Unified Admin Experience for GenAI Skills:

- Previously, skills cloned in AI Admin Hub could not be edited in AI Skill Kit, creating a fragmented setup process. With the new unified admin experience, users can manage GenAI skills seamlessly in AI Skill Kit. This includes adding necessary headers as input, configuring or editing prompts, and maintaining all settings in a single location.
- The unification migrates the AI Admin Hub setup experience to AI Skill Kit for all ServiceNow Otto for CSM cloned skills.

There are 2 ways to clone ServiceNow Otto for CSM skills:

1. Make a copy of AI skill from AI Admin Hub console.

   https://player.vimeo.com/video/996395898?h=e609c55303&badge=0&autopause=0&player_id=0&app_id=58479

2. AI Skill Kit Clone from AI Skill Kit.

   https://player.vimeo.com/video/985874233?h=2ccc18794b&badge=0&autopause=0&app_id=58479

Customizing a ServiceNow Otto for CSM skill

Learn how to access, activate, and customize a ServiceNow Otto for CSM skill using the AI Admin Hub console and AI Skill Kit.

Role required: admin

ServiceNow Otto for CSM provides base system skills that can be tailored to meet specific business requirements. Customization ensures that skills align with your organization's workflows, data sources, and user roles. There are two main ways to customize:

- Using AI Admin Hub console: Modify base system skills, input configurations, and display settings.
- Using AI Skill Kit: Build and publish custom skills for advanced use cases by customizing inputs and prompts, and then publish it. You can also use the AI Skill Kit to clone base system skills, as long as they are the latest versions created after the release of the AI Skill Kit.

Access and activate a skill in AI Admin Hub

1. Navigate to **All** > **AI Admin Hub** > **AI Skills**.
2. Select the AI Skills tab.
3. Select **Customer** > **CSM**
4. Choose the skill you want to configure.
5. Select **Activate Skill**.
6. Go through the guided set up steps and activate the skill.
7. To customize the base system skills:

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a. Make a copy of the skill as you cannot directly modify the base system skill.

b. Edit the copied skill's name so it is more descriptive for the LLM.

c. Adjust input configurations by adding fields or creating a new data source.

d. Test the skill with a sample record.

Tip:

- Select **Edit prompt in AI Skill Kit** to edit the prompt in AI Skill Kit.
- You need the sn_skill_builder.admin role to edit the prompt in the AI Skill Kit.
- To edit a prompt, locate the prompt for the specified provider, clone it, apply the necessary changes, add pre or post processors and conditions as needed, finalize and publish the updated prompt, and then return to test changes on AI Admin Hub console.

e. Customize how and when the skill capability will exist and be available.

f. Choose how the skill will be triggered.

g. Define who has access to this skill. Roles selected here will be available in the **Select display** step.

h. Select where to display the skill- **In-product**, or in the ServiceNow Otto panel.

i. Under each display type, open the chevron and specify user roles by entering role names in the User roles field.

j. Review your choices and select **Activate** to complete the skill customization.

Note: For more information, see Customize a case summarization skill in ServiceNow Otto for Customer Service Management (CSM).

Access and clone base system skills with the AI Skill Kit

1. Navigate to **All** > **AI Skill KIt**.
2. Under the **ServiceNow skills** tab, select the prompt you want to edit in AI Skill Kit.

   Note: You need the sn_skill_builder.admin role to activate and customize the prompt in the AI Skill Kit.

3. Create a clone for the selected skill by selecting the overflow icon ⋮
4. Enter a name, description and provider to clone the skill.
5. In the **Skill contents** pane, select the**Inputs** edit icon and add any inputs that you like to add to the prompt.
6. In the **Prompt** screen, select the edit icon and add the desired inputs to the prompt or Create a new prompt.
7. Test the prompt.
8. Evaluate the prompt.
9. Finalize and publish the skill from the AI Skill Kit.

   Warning: Once finalized, you won't be able to edit this version of the prompt. You can always update and create a new version, or clone and create a new prompt.

10. Test the changes on associated records.

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11. Activate it in the AI Admin Hub console and set display options.

Note: This is not required for all skills.

Customize ServiceNow Otto context menu for skills

If you have the admin role, you can customize a ServiceNow Otto for Customer Service Management (CSM) skill so that agents can use the generative AI skills in CRM Workspace and in Core UI.

Before you begin

Role required: admin

Note:

The context menu configuration is accessible through the AI Experiences in AI Admin Hub console. After activating the relevant skills, users are prompted to visit the Case NACM Config however, in the base system , configuration is already active. By default, it is configured to use extended tables for the resolution notes and activity response generation skill that is provided in the base system.

Case NACM Config is currently only available for resolution notes and activity response generation skill.

Procedure

1. Navigate to **All** > **AI Admin Hub** > **Experiences**.
2. Select ServiceNow Otto context menu.
3. Open the **Configuration** tab to view all the existing configurations.
4. Find the configuration name **Case NACM Config**.
5. Under Action, select the icon
6. Select **Edit configuration**.
7. In the guided setup, go to **General details** and customize the table name.
8. Select the **Record form fields** for table form use cases.
   The form fields are active for close notes, additional comment and work notes.
9. Select **Save and continue**.
10. Select **Configure Experience**, to configure the actions for the context menu trigger button and dialog.

    There are separate configurations for close notes, additional comment and work notes. Default action configured is **Generate resolution notes**.

    a. Configure the **Actions** to **Generate resolution notes**, **Shorten** and **Elaborate**.

    b. Configure the **Refinement actions** to **Shorten** and **Elaborate**.

    c. Configure the **Actions for generated content** to **Insert**.
    In the preview you can see how the context menu button will look like after configuration.

    By default, the **Enable support for extended tables** toggle is turned on and this configuration is shipped as active in the base system. This is to support sparkle on extended table on same field. Once the skill is active, this experience is available.

11. Select **Define access** to determine who can access this skill.

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By selecting specific roles, you're controlling who can use it. The roles you choose will also be available in the next step **Select display**.

Default and Custom Roles:

- If no changes are made, the default roles n_customerservice_agent and sn_customerservice.consumer_agent automatically appear in **Define Access** and **Select Display**.
- If custom roles were added before the upgrade, they are updated automatically by a script.
- If new roles are created after the upgrade, you can manually add them in both the **Define Access** and **Select Display**.

> **Note:** In the **Select Display** step, you can only choose roles that were added in the **Define Access** step. If you add a role in **Define Access**, you still must manually select it in **Select Display** to make it active.

12. **Select Display** to determine where to display the Case NACM Config.
    - Select In-product desktop to show Case NACM Config in all customer products on forms and workspaces.
    - Select roles for whom NACM config will be displayed.
13. In**Review and Activate** select **Activate** to activate the context menu for the skill.
    A record with the specific usage conditions can be selected from the drop down to test the configuration.
    The context menu has been successfully activated.
14. Select **Return to Customer** to complete and save this section.

Set up AI in the portal case form

Configure AI in portal case form to minimize case creation when a resolution already exists in the current knowledge base or external sources.

https://player.vimeo.com/video/1143919831?h=e548d4951c&badge=0&autopause=0&%E2%80%A6

Before you begin

Role required: admin

About this task

This configuration involves setting up the record producer, configuring related lists and variables, testing the configuration, and relating the catalog to the portal.

Procedure

1. Navigate to **All** > **Service Catalog** > **Catalog Definitions** > **Record Producers**.
2. Search and open the record producer **Create case for a product (AI)**.
   The base system configuration details display.
3. Select **Copy** to duplicate the record producer.
   This creates a new version you can customize for your use case.
4. Enter a **Name**.
   This is the title the customers see in the portal.
5. Set the **Table name** to a specific case type.
6. Modify the **Short description** and **Description** to match your use case.

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7. Scroll to review the variables list and update as required.
   For example, update the client scripts, change variables, add user criteria UI policies, and virtual agent topics and catalogs. You will find variables called **AI Search Assist** and **AI Genius Results** options in your configuration. Do not delete **Start**, **AI Search Assist**, **AI Genius Results Options**, and **Continue with Record Creation** to maintain the experience. These variables leverage the AI Search genius result widget found under AI Search Assist record producer configurations.
8. Select **Save** after completing all changes in the record producer configuration.
9. Select **Try It** to preview the record producer.
10. Navigate to **All** > **AI Search** > **AI Search Assist** > **Record Producer Configuration** to edit the record producer configuration that we previously duplicated.
11. Select **New**.
12. On the **Record Producer Configuration** form, fill in the following fields.

Field	Value
Search application information	
Search Application	Select the configuration for a portal that in cludes AI Q&A Genius Results. As an exam ple, you might select the Service Portal De fault Search Application configuration.
Record producer information	
Record producer	Select a record producer. As an example, you might select the Create case for a product record producer.
Search variable	Select the name of the field that you want to search and generate Genius Results from. As an example, you might select the Description field as your search variable.

13. Select **Submit**.
14. Navigate to **Service Portal** > **Portal** to connect the record producer to a catalog and Portal.
15. Search for the portal configuration and select it.
16. Scroll down to note the **Catalog** and **Taxonomy** topics.
17. Select the **Taxonomy** value.
18. Select a topic under **Child Topics**.
19. Select the **Enable AI Search** check box.
20. Select a pre-configured **Search Application** – CSM Portal Default Search Application.
21. Select **Update**.
22. Return to the record producer.
23. Edit the **Catalog** field to include the catalog we noted from the Portal settings.
24. Select **Assigned Topics** and add the relevant topic to confirm the record producer appears in the correct location of the portal.
25. Select **Save**.

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26. Navigate to the Portal and under **Catalogs** verify that the record producer appears under the specified topic.

    Note: Verify the catalog you related to the record producer is also related to the portal and fully published.

27. Navigate to the **Service Portals**.
28. Open the catalog and go to the record producer you created.

Result
The AI Case in form portal is now configured and available for use.

Related topics

Using Now Assist in portal case form

Skills performance dashboard

The skills performance dashboard helps you monitor how ServiceNow Otto for CSM skills are being used across CSM records and interactions. Use this dashboard to identify high-performing skills, track adoption trends, and spot skills that need attention.

Verify that:

- You have the required admin role.
- ServiceNow Otto for CSM skills are active in your instance.
- Analytics data collection is enabled.
- You have at least one ServiceNow Otto for CSM product configured.

View the Skills Performance dashboard

1. Navigate to **AI Admin Hub** > **Analytics** > **Skills Performance**.
2. Use the filters to refine your view:
   - **Date**: Select the time period to analyze
   - **Products**: Filter by specific AI products
   - **Skills**: Choose individual skills or view all skills

   Your filter selections apply to all visualizations on the page.
3. Review the performance indicators to understand skill usage patterns.

Usage metrics across the following ServiceNow Otto for CSM skills are:

- Email recommendations
- Chat recommendations
- Case summarization
- Chat summarization
- Sentiment Analysis case
- Activity response generation
- Sidebar summarization

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- Resolution notes generation
- KB generation

Understand the performance indicators

The GenAI skills dashboards within Platform Analytics provide comprehensive metrics for tracking skill usage across CSM record and interaction pages. The dashboards include several default widgets that deliver insight into skill performance and user adoption. The **Skills Performance** dashboard provides the following key visualizations:

Default widgets:

- **Skills usage trend**- Displays how frequently each skill is selected, triggered, and successfully executed over time, enabling you to monitor skill engagement over time.
- **Daily active users**- Shows the number of unique users activating GenAI skills each day, helping you measure adoption rates.
- **Acceptance rate**- Tracks the percentage of GenAI-generated content that users accept and apply compared to manually created content, providing a clear measure of content quality and user trust.
- **Skills feedback**- Captures end-user feedback through thumbs up and thumbs down responses on generated outputs.

Custom widgets:

- **Skill usage trend by customer agents**- A customizable widget that highlights which customer agents are using GenAI skills most frequently, helping you identify usage patterns at the individual agents level.
- **AI actions per assignment group**- A customizable widget that highlights which assignment groups are using GenAI skills most frequently, helping you identify usage patterns at an assignment group level.

Note:

- Sentiment analysis on case, KB Generation skills don't have all 6 widgets.
- Sentiment analysis doesn't have Daily active users, Skill Usage Trend by Customer Agents, AI actions per assignment group.
- KB generation doesn't have Acceptance rate and Skills feedback.

View detailed skill information

To drill into specific skill performance:

1. On the **Skills Performance** dashboard, select **View skill details**.
2. Choose the skill that you want to analyze.
3. Review the detailed usage and performance metrics for that skill.

Related topics

Analyzing Now Assist usage

AI Analytics dashboard indicator details

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Customize Case Insights Ask AI button system properties

Update the Case Insights Ask AI button system properties to control the drop-down and quick questions displayed on the CSM Case Insights section in your instance.

Before you begin

Role required: admin

- ServiceNow Otto for Customer Service Management (CSM) must be installed in your instance.
- Case summarization, Customer summarization or Special handling notes summarization skills must be activated.

About this task

System properties control the behavior of the Ask AI feature on the CSM Case Insights section. Two Ask AI properties are available:

- *sn_csm_gen_ai.ask_ai_dropdown_questions* — controls the drop-down questions displayed for the Ask AI feature on the CSM Case Insights section.
- *sn_csm_gen_ai.ask_ai_quick_questions* — controls the quick questions displayed for the Ask AI feature on the CSM Case Insights section.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. In the **Name** search field at the top of the list, type `ask_ai`.
   The list filters to show the following two properties:
   - *sn_csm_gen_ai.ask_ai_dropdown_questions*
   - *sn_csm_gen_ai.ask_ai_quick_questions*
3. Select the name of the property you want to configure.
   The **System Property** record opens and displays the following fields:
   - **Suffix** — the unique suffix of the property name.
   - **Name** — the full system property name (read-only).
   - **Description** — a description of what the property controls.
   - **Choices** — available list options, if applicable.
   - **Type** — the data type of the property (for example, choice list).
   - **Value** — the current value of the property.
   - **Ignore cache** — when selected, changes take effect without a cache flush.
   - **Private** — when selected, the property value is hidden from display.
   - **Read roles** — roles permitted to read this property.
   - **Write roles** — roles permitted to update this property.

   Tip: For the *sn_csm_gen_ai.ask_ai_dropdown_questions* property, the default **Type** is **choice list** and the default **Value** includes: Identify potential root cause, Recommend resolution steps, Show similar resolved issues, Show similar open issues.

4. In the **Value** field, enter or modify the value as required for your instance.
   For choice list properties, enter each option as a comma-separated list.

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5. **Optional:** In the **Description** field, edit the text to reflect any instance-specific notes or changes to the property.
6. Select **Update** to save the changes to the property record.

Result

The Ask AI system property is updated. The new value takes effect for the Ask AI feature on the CSM Case Insights section. If **Ignore cache** is selected, changes are applied immediately without requiring a cache flush.

What to do next

- To configure the second Ask AI property, select its name from the list and repeat this procedure.
- Test the Ask AI feature in the **CSM Configurable Workspace** to verify that the updated questions appear as expected.

In-product trigger for agentic AI in Customer Service Management

In-product trigger for agentic AI shows agentic workflow status, presence indicators, and AI-generated insights directly on Customer Service Management (CSM) record and interaction pages.

The AI workflow feature is built directly into Customer Service Management (CSM). This feature is available on Core UI and Configurable Workspace of the case records. You can view AI activity, respond to workflow prompts, and track progress — all from the case record page. AI indicators, workflow presence, and a dedicated AI Workflow tab are available on case records and interaction pages in the contextual side panel. The feature also introduces a **Triage Cases** button that initiates agentic workflows directly from the case form.

AI Workflow integration

AI workflow supports human-initiated and autonomous agent-initiated workflows. When triggered, the system displays a presence indicator showing that AI is actively analyzing the record. The AI Workflow tab gives you a unified view of a workflow's status, findings, required inputs, and history, making it easy to work with AI-generated insights and automation. When a workflow needs input from the user, an alert appears with a **Review** button. Selecting this button takes you directly to the **AI Workflow** tab, opens the **Interactive View**, and automatically focuses on the specific plan that requires your input.

AI Workflow UI Components

The following table describes the key user interface components that support in-product trigger for agentic AI.

UI component	Description
Triage Cases button	Trigger agentic workflows directly from case records using the Triage Cases button, eliminating the need to navigate to ServiceNow Otto panel. When you select the Triage Cases button on a case record, the system automatically initiates an agentic workflow for the case and email interaction record. You can monitor workflow progress by accessing the **AI Workflow** tab, where the same workflow appears with complete visibility. From this tab, you can drill into the workflow details to review individual steps or provide any required input to advance the workflow.

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UI component	Description
AI presence indicator	View the visual indicator showing that AI is actively running an agentic workflow on the current record. Selecting the indicator displays AI activity status and shows up when **Triage Cases** button is selected.
AI Workflow tab	A dedicated tab that displays in#progress, completed, input#required, ready for review, failed, and cancelled workflows. You can view workflow details, AI#generated findings, and workflow history.
Workflow detail experience	Provides a step#by#step view of workflow execution. You can see each step in the workflow as it happens. You can check the workflow's status at any time. You can easily tell when the system needs information from you. You can also read the main findings and insights the AI has prepared. When you're ready, you can choose to continue to the next step, skip extra details, or let the workflow finish on its own. For example, if a workflow requires input like "Do you want deeper insights?", responding with No moves the workflow directly to complete state.
AI record indicators	Alerts and system#generated indicators showing AI#assisted record creation, findings, and transparency details directly on the case record.
Input request panel	Displays workflow #requested inputs such as text, Boolean, single#select, multi#select, or drop down values that enable you to influence workflow progression.
Workflow history	Shows completed actions, AI findings, supervision information, and any user responses supplied during workflow execution.

Feature behavior

The AI workflow tab provides a single view of all AI workflows related to a record. It shows workflow status, step-by-step details, and any required inputs, which you can enter directly in the tab. Workflows can also be canceled when needed.

By default, this feature is turned off in the base system. To enable it, admin must set the system property com.glide.agentic_processes_view.enabled in global scope. Once the system property is enabled by an admin, the **Triage Cases** button (UI Action) and the **AI Workflow** tab is set to visible. If you prefer to hide this option, you can disable it in AI Agent Studio. To disable the **Triage Cases** button:

1. Open AI Agent Studio.
2. Select the **Triage Cases** agentic workflow.
3. Navigate to **Select Channel and Status**.
4. Scroll down to the **UI Actions** section.
5. Toggle the **Display** option to turn the button on or off.

This allows admin to control whether the **Triage Cases** button appears in the agent interface. All workflows must be initiated by a human agent.

Note: The sn_now_canvas_ai.interactive_view_user role must be manually added to the sn_esm_agent role to enable agents to view the **AI Workflows** tab in the side panel.

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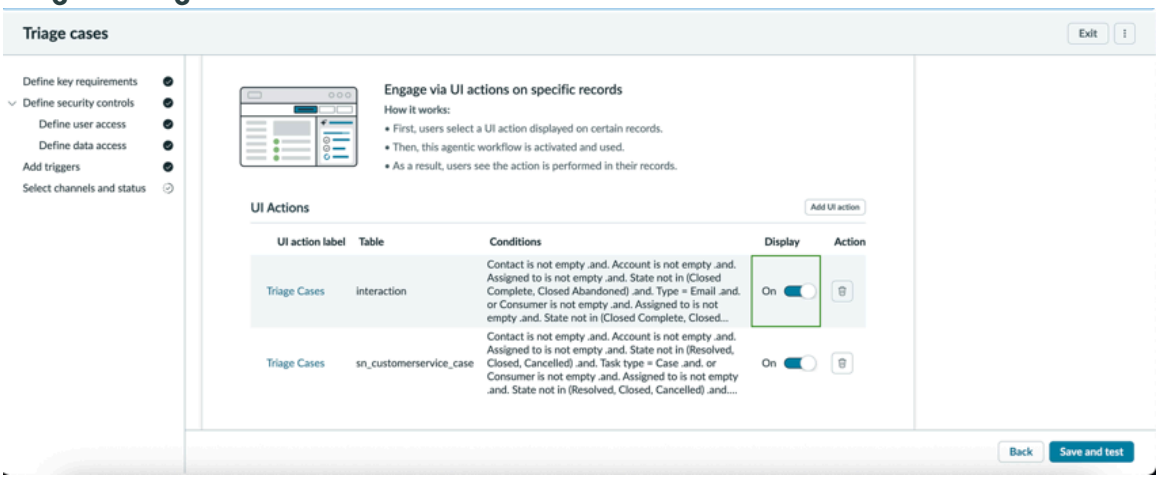
Triage Cases guided flow



The **AI Workflow** tab is visible on following pages in CRM Workspace:

- CSM default record page
- CSM frontline case page
- CSM interaction record page
- Email interaction record page
- Voice interaction record page
- Centered chat record page

The **AI Workflow** tab is visible on following pages in Core UI:

- Case view
- Email interaction view

Note: The in-product trigger **Triage Cases** button is only enabled for case records and email type interactions.

Configure AI Search to use with the Troubleshooting steps identification AI agent

Configure AI Search with the Troubleshooting steps identification AI agent to fetch the relevant cases and knowledge articles that could help solve your issue.

Before you begin

Role required: admin

About this task

This AI agent relies on AI Search for fetching the relevant cases and knowledge articles that could help solve your issue. For more information on configuring AI Search, see Using AI Search with CRM Workspace and Semantic index configuration for indexed sources.

Procedure

1. Navigate to **All** > **AI Search** > **Indexed Sources** > **[CSM AIS] Case**.
2. In the Semantic Index Configuration related list, select **Body**.
3. Select **Active**.
4. Select **Save**.

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Configure the Troubleshooting steps identification AI agent to use the Search retrieval tool

Configure the Troubleshooting steps identification AI agent to use the Search retrieval tool to fetch relevant cases and knowledge articles, including their attachments, to help solve your issue.

Before you begin

Role required: admin

About this task

The Search retrieval tool is configured to use the [CSM AIS] Configurable Workspace Search Config AI search profile. By default, this profile is linked to the Case and Knowledge search sources, which are defined in the [CSM AIS] Case and Knowledge Table indexed sources. For more information, see Indexed sources in AI Search.

Procedure

1. Navigate to **All** > **AI Search** > **Indexed Sources** > **New**.
2. On the form, fill in the **Name**, **Source**, and **Retention Policy** fields and select **Submit**.
   For a description of the field values, see Indexed Source form.
3. In the Semantic Index Configuration related list, select **New** and fill in the details as needed.
   For a description of the field values, see Semantic Index Configuration form.
4. In the Semantic Index Fields related list, select **New** and add the fields of the table that you want included in your search.
   For a description of the field values, see Semantic Index Field form.
5. Navigate to **All** > **AI Search Sources** > **New**.
6. On the form, fill in the **Name**, **Indexed Source**, and **Conditions** fields.
   For a description of the field values, see Search Source form.
7. Navigate to **All** > **AI Search** > **Search Profile** > **New**.
8. On the form, fill in the **Name** and **Description**.
9. In the Search Sources related list, select **Link Existing** and then link the previously created search source(Step 6).
10. Activate the search profile created in Step 7 and Step 8 by selecting **Publish**.
11. Navigate to **All** > **AI Agent Studio** > **Overview** > **Explore All**.
12. On the **AI agents** tab, navigate to **Troubleshooting steps identification AI agent** > **Add tools and information** > **Search retrievals** and select **Get Similar cases and Relevant knowledge articles**.
13. In the Edit search retrieval window, add the previously created indexed source into **Search sources** and then specify what to search for in the **Fields returned** and **Semantic index fields**.
    For a description of the field values, see Add a search retrieval to an AI agent.
14. Select **Save**.

Result

The Troubleshooting steps identification AI agent can now use the Search retrieval tool to fetch the relevant information from additional sources.

Using ServiceNow Otto for Customer Service Management (CSM)

If you have an agent role, you can summarize the customer chat conversations, summarize the case details, and generate the case resolution notes with the ServiceNow Otto for Customer Service Management (CSM) application.

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Skills reuse

By default, all skills exist in the global domain. When you use ServiceNow Otto in a domain-separated environment, users are only able to access data within their domain. For example, if a user uses the ServiceNow Otto summarization skill, ServiceNow Otto only uses material that exists within the user's domain when generating that summary. Additionally, there is no co-mingling of data for domain-separated instances when using generative AI skills. The data resides only on the instance, and the shared services used for generative AI do not persist any requests (prompts) and responses. For more information, see Domain separation in the AI Admin Hub console. (Note that global domain is not the same as global scope. For more information, see Exploring Next Experience pickers.)

Summarize your chat conversations to understand the chat context quicker:

- Summarize the chat between the Virtual Agent and the customer when the chat is handed off to a live agent.
- Summarize the chat between a live agent and a customer when a chat is handed off to another live agent or when an agent wraps up the conversation and ends the interaction.
- Summarize the chat at any point during the conversation using the `/summarize` quick action.

Summarize the case details to understand the case context quicker. These summaries are useful for long-running or complex cases that include multiple conversations between agents and customers.

Generate the case resolution notes to wrap up cases faster. When you're ready to propose a solution to a customer, this feature can generate resolution notes and add them to the Case form. The resolution notes also provide the context about the case resolution to other agents who might encounter similar issues.

Summarize a chat conversation by using ServiceNow Otto for Customer Service Management (CSM)

Generate a summary of the Virtual Agent chat history and the chat conversation between a live agent and a customer by using the chat summarization skill in the ServiceNow Otto for Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

The chat summarization skill enables you to do the following actions:

- Summarize the Virtual Agent chat history and provide a summary of the actions taken by the customer before the customer engages with a live agent.
- Summarize the live agent and customer chat history, including customer actions before the call is handed off to another live agent.
- Summarize the chat at any point during the conversation using the `/summarize` quick action.
- Summarize the chat when handing off to another agent or ending the interaction.

Note: You can also generate a chat summary on demand from the ServiceNow Otto panel.

Procedure

1. Navigate to **Workspaces** > *`CRM Workspace`*.
2. In CRM Workspace, open a chat from your inbox.

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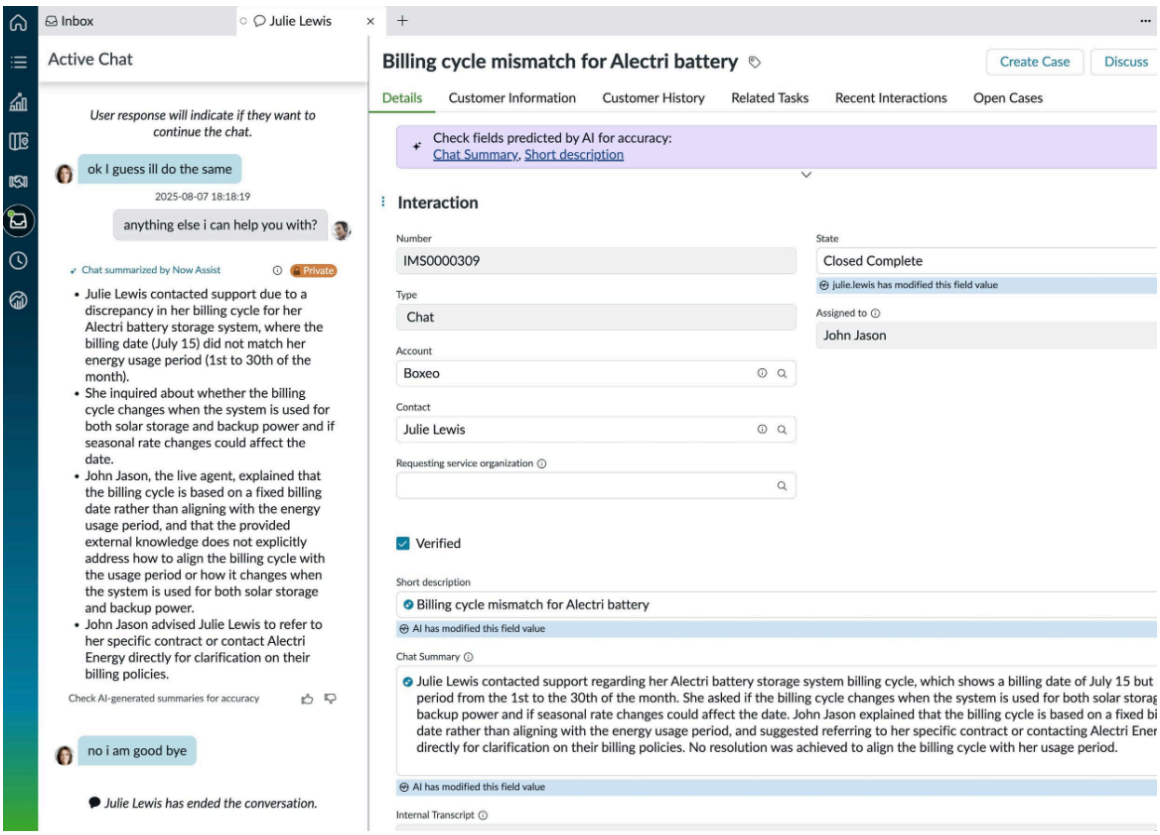
The chat summarization skill creates an inline summary in the Active Chat window. This summary includes the customer's issue and the actions that the customer has taken before the customer engaged with a live agent. The summary appears in the Active Chat window and is identified by the AI icon ( ) and the **AI chat summary** label.

Interaction record with chat summaries



3. **Optional:** Provide feedback for the chat summary by selecting the helpful icon ( ) or not helpful icon ( ) on the summary card.
   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).
4. Chat with the customer to get any additional details about their question or issue.
   For example, if the customer is having an issue with the hardware, you may need the hardware model number and serial number.
5. In the Active Chat window, use the `/summarize` quick action to summarize the chat during the conversation with the customer.
   The chat summarization skill creates an additional inline summary in the Active Chat window. This quick action is helpful if you want to summarize long or detailed customer conversations.
6. **Optional:** If Live Agent to Live Agent handoff is enabled, transfer a chat to another agent after accepting an incoming chat with the following steps:

   a. Select the Transfer to Agent icon to transfer the interaction to another agent.

   b. Select the name of another live agent.

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c. The second live agent selects **Accept** to join the chat.
Another summary of the chat is created when the conversation moves from one live agent to another live agent.

7. End the chat conversation by selecting **End Chat**.
The chat summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record when you end the chat.

> **Note:** If a chat summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

8. Review the text in the **Short description** and **Chat Summary** fields and make any necessary corrections.
Because the information in these fields is automatically generated, it's a good idea to review the text and make sure it's accurate.
9. Select **Save**.

What to do next

If necessary, you can create a case from an interaction record. The system uses the information from the **Short description** and **Chat Summary** fields on the interaction record to populate the **Short description** and **Description** fields on the case record.

The system displays the AI icon ( ) next to these fields and removes the icon if the agent makes changes to the fields and saves the record.

Summarize a Sidebar discussion by using ServiceNow Otto for Customer Service Management (CSM)

Generate a summary of the Sidebar discussions between agents, requesters, and subject matter experts by using the chat summarization skill in the ServiceNow Otto for Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can do these actions by using Sidebar discussion summarization:

- Summarize the Sidebar discussion at any point during the discussion using the `/Summarize` quick action.
- Share the Sidebar discussion to the work notes.
- Provide feedback for the summary.

> **Note:** The Sidebar discussion summarization skill is on the chat skill card in the Customer group.

Procedure

1. Navigate to **Workspaces** > *`CRM Workspace`* and open a customer service case that supports Sidebar discussion and summarization.
2. Choose an existing discussion, or start a new discussion.

   Start a new discussion by doing these actions:

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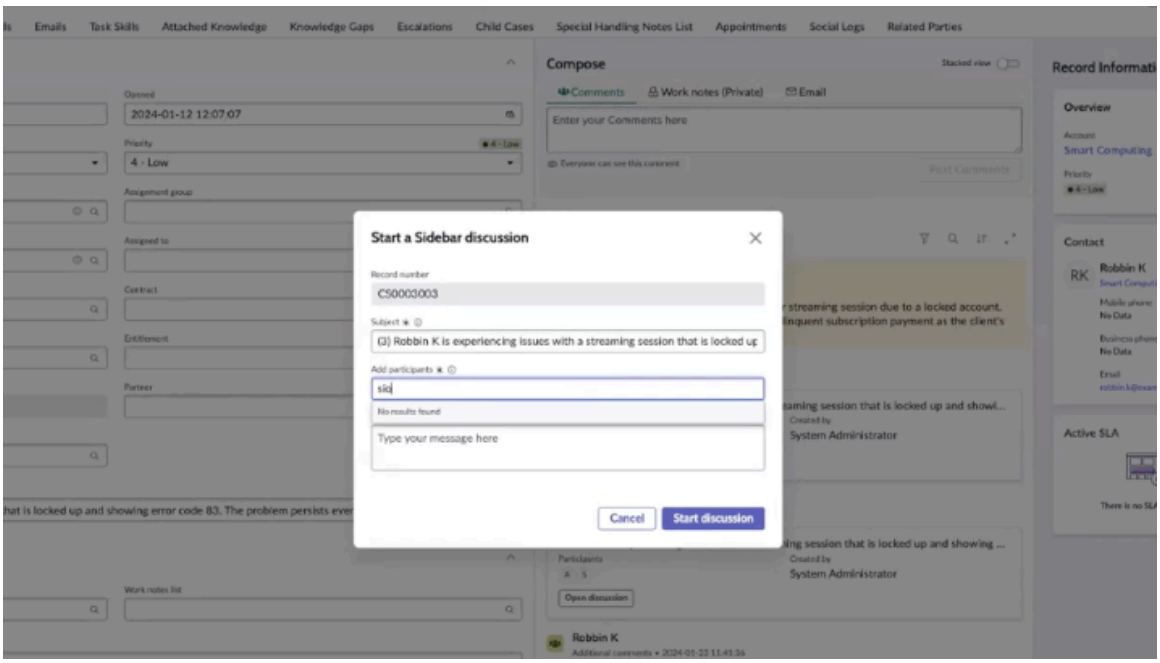
a. Select **Discuss**.

b. In the Start a Sidebar discussion modal, add participants.

c. Select **Start Discussion**.

Sidebar discussion modal



3. Generate a summary of the Sidebar discussion during the conversation.

   Use one of the following methods:

   - Enter `/Summarize` in the Active sidebar discussion window.
   - Select the quick action icon .

4. After summarizing the Sidebar discussion, you can add it to the case work notes, and provide feedback about it.

Option	Procedure
Save the summary information by adding it to the case work notes	**a.** Select **Share as Work notes**. **b.** In the Share Case summary as Work notes dialog box, edit the summary. **c.** Select **Save to Work notes**.
Provide feedback for the summary	If you'd like to provide feedback, select either the helpful icon ( ) or 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_generative_ai_log_list.do).

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Generate a chat reply recommendation by using ServiceNow Otto for Customer Service Management (CSM)

Generate a reply based on the context of the chat conversation using AI icon. Chat reply recommendations can help provide agents with quick replies to common questions.

See the video to understand how generative AI provides agents with suggested, personalized responses during live chat interactions.

https://player.vimeo.com/video/1160327487?h=a0b394525a&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Role required: admin

About this task

You can do these actions by using the AI icon:

- Generate a recommended reply that is based on the context of the conversation.
- Refine the recommendation by elaborating or shortening the response.

Note: The Chat reply recommendation skill is on the Chat skill card in the Customer group.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Open the inbox and accept the chat interaction.
   In the Active Chat section of the interaction, a summary of the Virtual Agent conversation is generated. The summary includes the actions that were taken before the requester engaged with the live agent. With this information, you can get an overview of what the requester has already mentioned in the Virtual Agent conversation and troubleshoot the issue.
3. Chat with the requester to get any additional details about their question or issue, if needed. For example, if the requester is having an issue with hardware, you may need the hardware model number and serial number.
4. In the chat message window, either type a response, or leave blank, and then select the AI icon ✦

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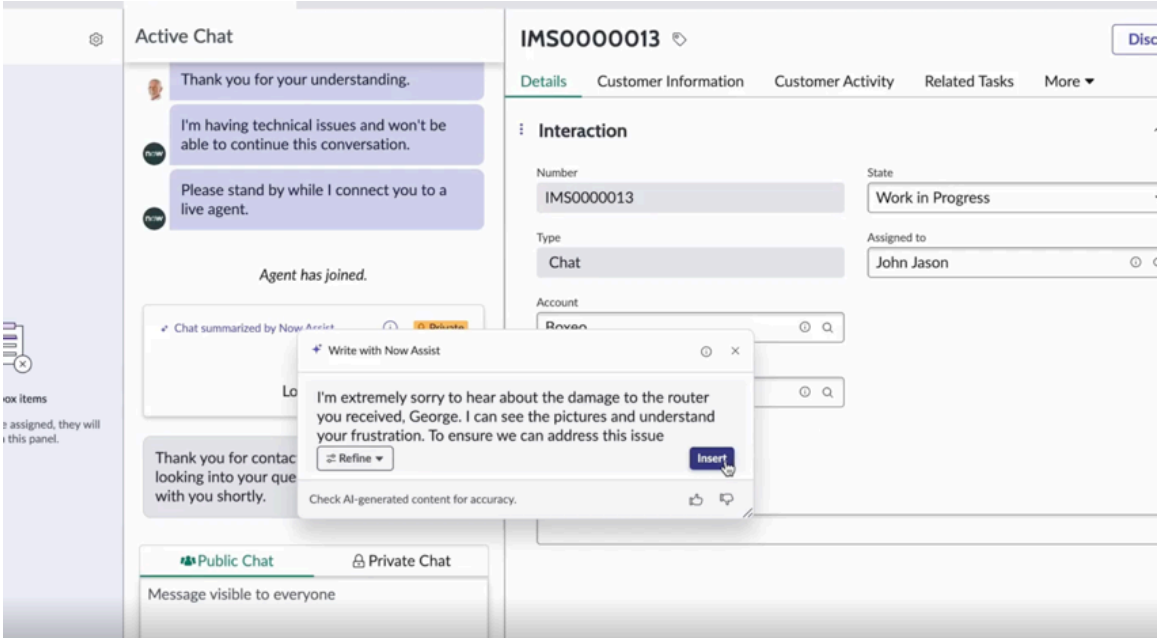
Now Assist icon Modal



Chat message window	AI icon
Typed response	Provides the option to refine your response: ○ Elaborate ○ Shorten Provides the option to change your tone: ○ Casual ○ Formal ○ Sympathetic
Left blank	Generates a recommended reply that is based on the context of the conversation up to this point.

The reply response appears in the AI icon modal.

5. Review the generated reply and select **Refine** to modify the response, or select **Insert** to paste the response into the chat message window.
   If the reply response was refined, you can toggle between versions.
6. In the chat message window, select **Send**.
7. End the chat by selecting **End Chat**.

Related topics

https://www.youtube.com/watch?v=6A5jwZFOPR4

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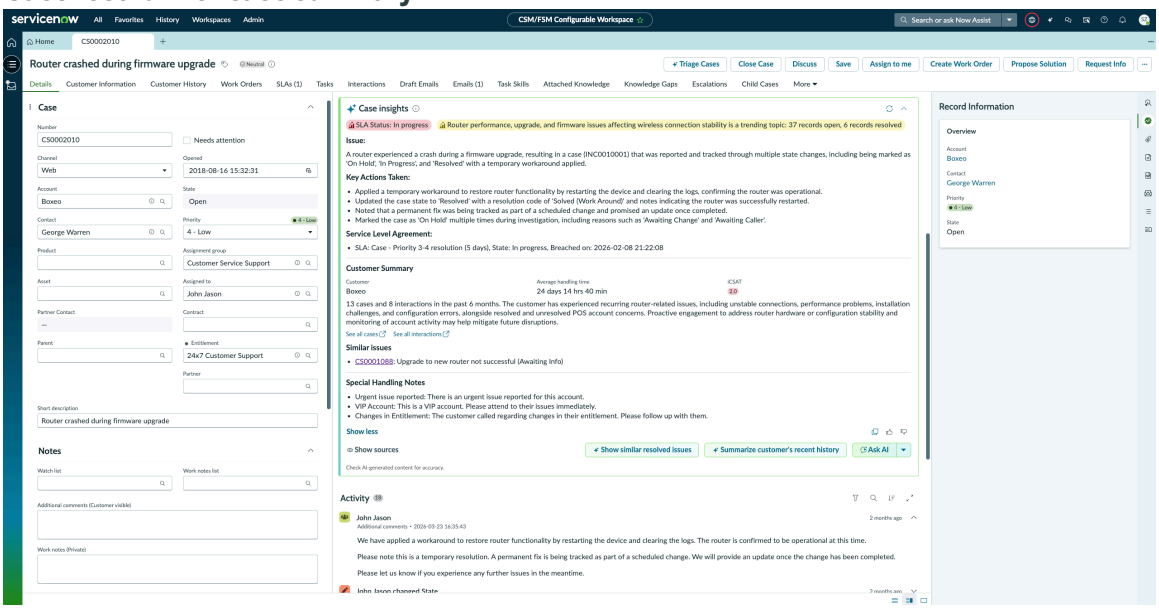
Summarize case insights by using ServiceNow Otto for Customer Service Management (CSM)

Use ServiceNow Otto for Customer Service Management (CSM) to generate a consolidated view of case insights directly from the case record. The **Case Insights** section surfaces a summary of the case alongside key contextual information to help service reps understand and act on cases quickly.

Before you begin

Case record with case summary



Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

The **Case Insights** section requires the case summarization skill to be enabled. Customer summarization and Special handling notes must be active to enable all sections. The **Case Insights** section is available in the CSM default record page and front line record page in the CRM Workspace version 26.1.1 and later. Earlier version was **Case summary** and is available in CRM Workspace version 26.1.0 and earlier.

About this task

When a customer service agent opens a case or navigates to the case record page, AI checks whether there is enough information to generate a summary. If there is, the **Summarize** button appears. If not, the component displays a message instead.

The **Case Insights** section includes:

- **Banner**: Shows SLA status and trending topic information.
- **Case summary**: A generated summary of the case including the reported issue, actions taken, Service Level Agreement (SLA) details, and a trending topic banner when applicable.
- **Customer summary**- Key account details including lifetime value, plan type, average handling time, and CSAT score. Also shows the number of recent cases and interactions, recent issue history, and links to navigate to all cases and interactions.
- **Special handling notes**- Notes that bring important information about individual records, such as a case or account record, to the service rep's attention.

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- **Ask AI**- An open prompt for follow-up questions in the Now Assist panel, with a drop-down for additional options.

Note:

- When the Provide customer 360 insights AI agent workflow is enabled in the ServiceNow Ottopanel, the **Ask AI** button is visible. When the AI agent workflow is turned off, the **Ask AI** button is hidden.
- When an agent selects the **Ask AI** button, the ServiceNow Otto panel opens and initiates the **Provide customer 360 insights** AI agent workflow without a template question. The panel returns a general summary of the case, which is the same output produced when an agent selects the **Provide customer 360 insights** pill directly in the panel. Agents can then submit follow-up questions within the panel.
- When an agent selects a preset question from the **Ask AI** drop-down, the panel opens and initiates the **Provide customer 360 insights** AI agent workflow with the selected question. The panel returns a response specific to that question. Agents can then submit follow-up questions within the panel.
- To customize Ask AI drop-down menu and quick questions, see Customize Case Insights Ask AI button system properties

Procedure

1. Navigate to **Workspaces** > *CRM Workspace* and open a customer service case.
2. In the **Case Insights** section, select **Generate**.
   - If automatic triggering is enabled, AI generates the summary automatically when the case is opened.
   - If automatic triggering is off, the **Summarize** button appears and service agent can generate the summary on demand.
3. The **Case Insights** section displays the summary.
   - Generating and displaying the summary may take several seconds.
   - The section is collapsed by default on the record form- select **View more** and use the scroll bar to view the rest.
4. After generating case insights, you can take any of the following actions:
   - Copy the case summary: Select the copy to clipboard icon ( ) to use the case summary information for another purpose, such as pasting into an email.
   - Provide feedback:
     - Select the helpful icon ( ) or the not helpful icon ( ).
     - This feedback improves the generative AI model and can help to improve the future versions of this skill. The system stores feedback in the generative AI logs (sys_generative_ai_log_list.do).
   - Ask follow-up questions:

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- Select the **Ask AI** button to open the Now Assist panel and view key findings, or
- Select the **Ask AI** drop-down button and select one of the menu options: **Identify potential root cause**, **Recommend resolution steps**, **Show similar resolved cases**, and **Show similar open issues**.
- The Now Assist panel opens and triggers the Provide customer 360 insights AI agent workflow, which retrieves answers based on the context of the current case.

- Expand or collapse the summary: Select the expand card icon (﹀) or the collapse card icon (﹀) to see more details or fewer summary details.

Related topics

Configure Case Summarization

Generate an email response by using ServiceNow Otto for Customer Service Management (CSM)

Generate an email response that is based on the case and email context by using the AI icon. With email response, agents can create quick emails or responses, helping minimize errors and ramp up productivity.

https://player.vimeo.com/video/1129307545?h=ee0d47dd56&badge=0&autopause=0&player_id=0&app_id=58479%2Fembed

Before you begin

Role required: admin

About this task

An agent can do these actions by using the AI icon:

- Generate a recommended email response that is based on the case and email context.
- Generate recommended email for new, forwarded, and finishing draft emails.
- Refine the recommendation by elaborating or shortening the response.
- Availability of email template recommendations while composing an email.

Note: The email response skill is on the Case skill card in the Customer group.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace* and open a customer service case that supports the email response.
2. Choose how to compose an email.

Method	Description
Compose email from More actions	**a.** Select **Compose email**. **b.** Write six or more words and then select the words that you just wrote to see the AI icon ✦ **c.** Select the AI icon ✦ to generate a re sponse.

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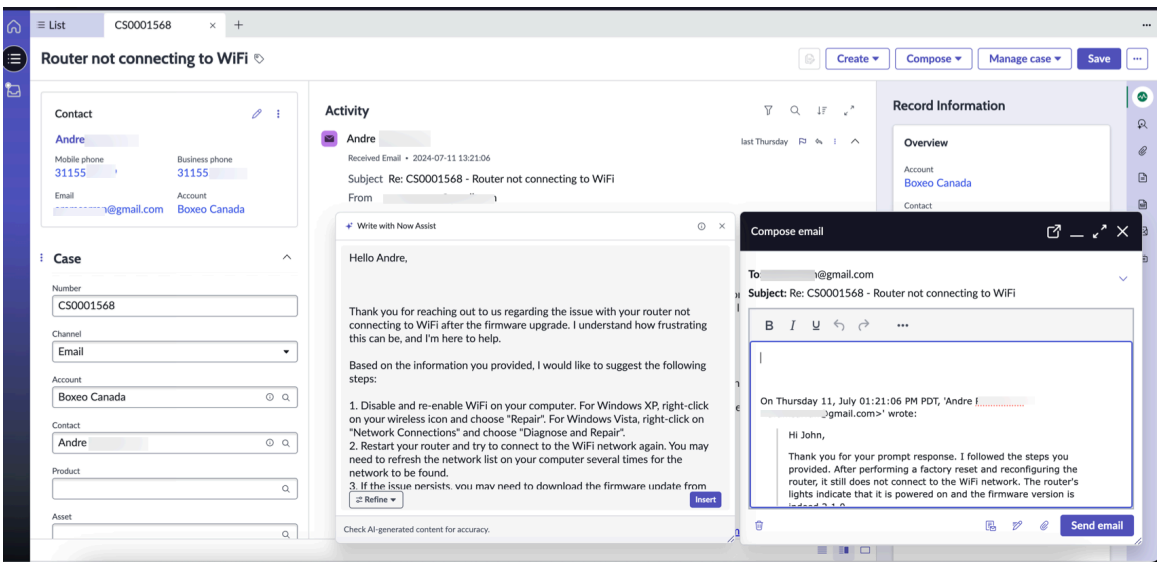
Method	Description
	d. Select **Refine** to shorten or elaborate the content. **e.** Get a recommendation that is based on the existing context.
Compose an email from Activity stream	**a.** In the activity stream, select an existing email that you want to reply to. **b.** Position your cursor within the email mes sage window to see the AI icon ✦. **c.** Select the AI icon ✦ to receive a recom mendation that is based on the existing con text.

3. In the email message window, either type a response, or leave blank, and then select the AI icon ✦.

AI icon modal



Email message window	AI icon
Typed response	Provides the option to refine your response: ○ Elaborate ○ Shorten Provides the option to change your tone: ○ Casual ○ Formal ○ Sympathetic
Left blank	Generates a recommended email response that is based on the context of the email up to this point.

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Email message window	AI icon
Use template	○ Shows email template recommendations while composing an email. ○ Generates reply suggestions in the com pose area using preconfigured templates, including headers, footers, and signatures.

4. Update the selected text with refined text by selecting **Replace**.
5. Review the generated email response and select **Refine** to modify the response, or select **Insert** to paste the response into the chat message window.
6. Select **Send Email** or discard the draft if you don't like the recommendation.

Generate resolution notes in case form

Use the ServiceNow Otto context menu in the resolution notes field of the case form in both Core UI (UI16) and Workspace to create resolution note.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

Watch this video to learn how to generate the resolution notes for a case.

https://player.vimeo.com/video/1167573799?h=b969dfc427&badge=0&autopause=0&player_id=0&app_id=58479

You can generate resolution notes for a case in both the CRM Workspace and Core UI. Use the ServiceNow Otto context menu within the resolution notes field in the case form to generate resolution notes.

Note:

- The context menu is the recommended experience. The popup window experience is going to be deprecated. Each interface operates differently.
- The case must be in the open state.

An agent can do these actions by using the AI icon ✦:

- Generate resolution notes based on the case context.
- Refine the recommendation by elaborating or shortening the content.

Procedure

1. Navigate to **Workspaces** > **CSM/FSM Configurable Workspace** and open a customer service case that is in an open state.
2. Navigate to the Resolution notes field in the case form.
3. Select the AI icon ✦.
   AI icon ✦ generates a recommended text that is based on the context of the case.

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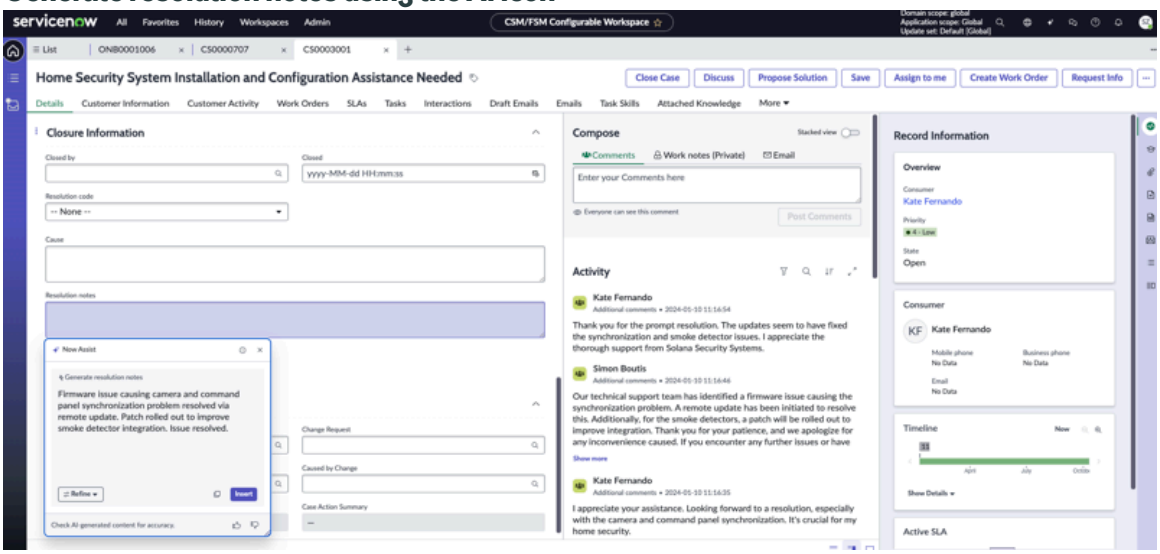
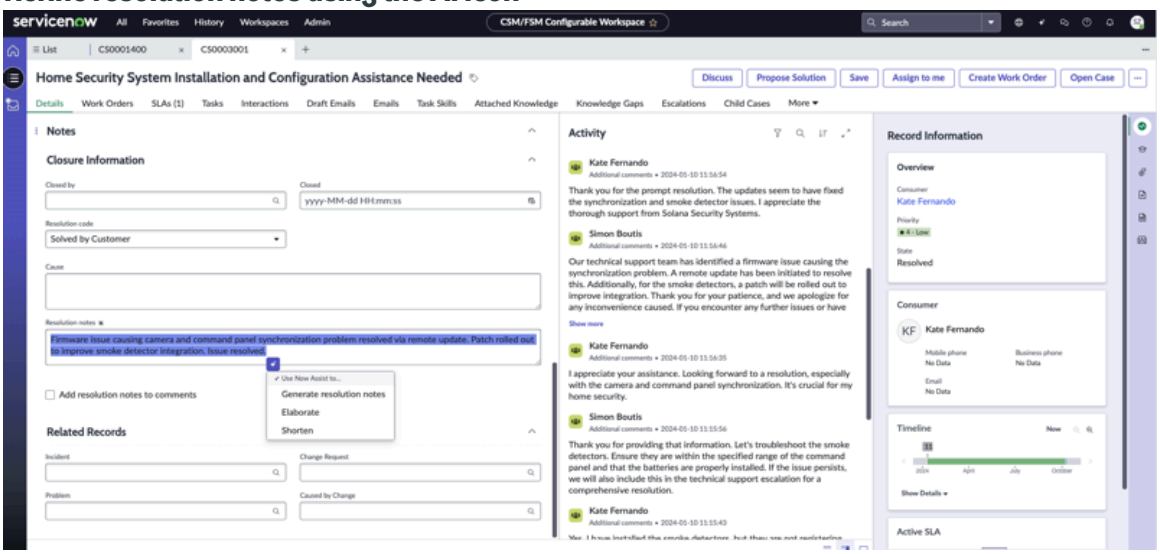
Generate resolution notes using the AI icon



4. Select **Insert** to add the generated content into the resolution notes field.
5. **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.

Refine resolution notes using the AI icon



Generate the resolution notes for a case by using ServiceNow Otto for Customer Service Management (CSM)

Use the resolution notes generation skill in ServiceNow Otto for Customer Service Management (CSM) to generate resolution notes for a case. You can propose the resolution to the customer and add it to the case record. By generating the resolution notes, you can wrap up cases faster and provide information about the case resolution to other agents who might encounter similar issues.

Before you begin

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

In CRM Workspace and Core UI, you can generate the resolution information for a case by selecting **Propose Solution** on the case record. This UI Action displays the Propose Solution

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modal. Using this modal, you can select a resolution code, add information about the cause of the issue, and review and edit the resolution notes text.

Note: The Propose Solution UI action is available to the customer service agents who have assigned cases in the Open state.

You can also generate resolution information on demand from the ServiceNow Otto panel.

Note: The resolution notes generation skill requires a minimum of 50 words in the case record to generate the resolution notes. If the resolution notes cannot be generated, the system displays a message below the **Resolution notes** field.

Note: You can skip this if you're using the ServiceNow Otto Content menu experience for Resolution Notes Generation skill.

Procedure

1. In CRM Workspace, open a customer service case.
2. Select **Propose Solution**.
   The system generates a resolution summary and displays the information in the Propose Solution modal, which includes the following fields:
   - **Resolution code**
   - **Cause**
   - **Resolution notes**

   If the **Resolution notes** field on the case record is empty, the resolution notes generation skill adds the information to this field in the modal.

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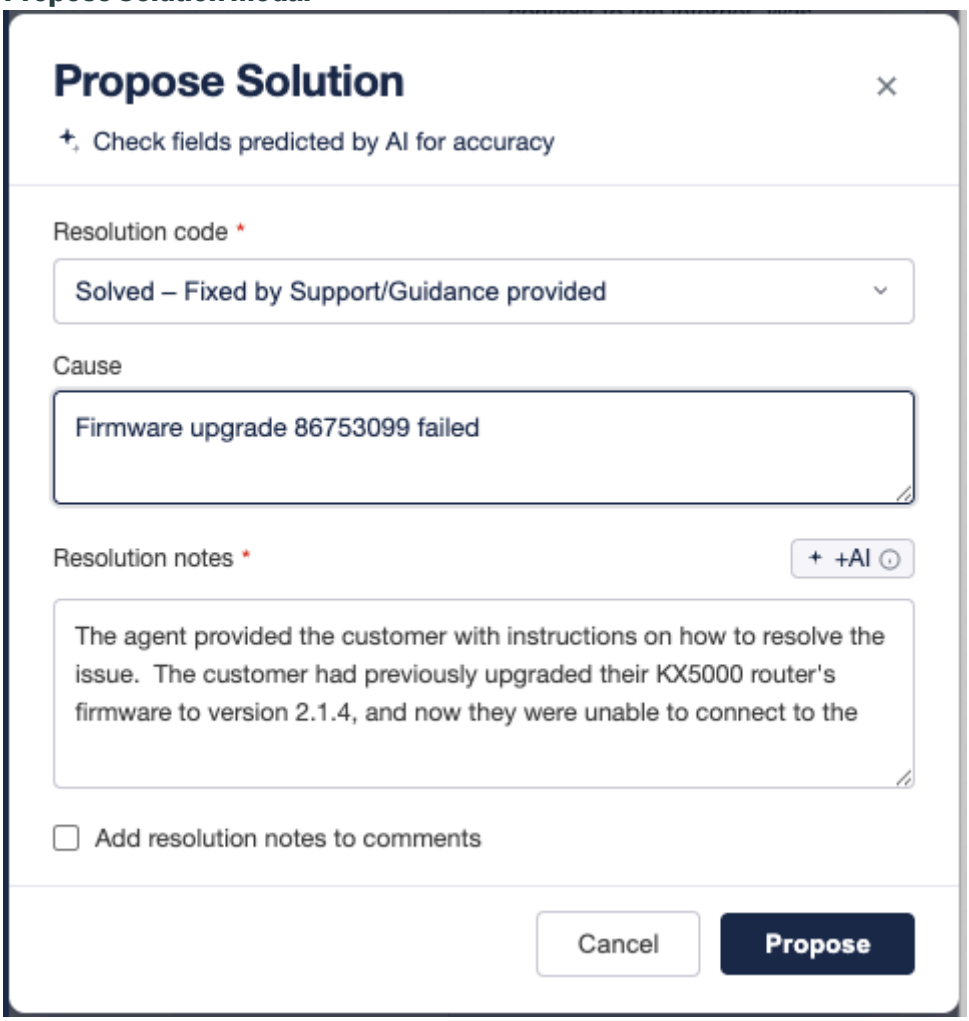
Propose Solution modal



3. Select a **Resolution code** for the case.
   A resolution code describes how the case was resolved. For example, common resolution codes include:
   - Solved: Fixed by Support/Guidance provided
   - Solved: Fixed by closing related PRB
   - Solved by customer
4. **Optional:** If you know the cause of the customer's issue, add it to the **Cause** field.
   For example, a customer's issue may be the result of a software upgrade.
5. In the **Resolution notes** field, review the resolution summary and make any necessary corrections.
   Because the information in this field is automatically generated, it's a good idea to review the text and make sure it's accurate. Any changes that you make are saved when you save the case record.
6. **Optional:** If you want to add the resolution information to the 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 case activity stream.
7. Select **Propose**.

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

Generate a knowledge article with ServiceNow Otto

Generate knowledge articles for resolved and closed cases within the CRM Workspace and classic environment using ServiceNow Otto.

Before you begin

To generate a knowledge article for a case, the case must be in the **Resolved** or **Closed** state and must not already have a knowledge article linked to it. Although the **Create Knowledge** button appears in other states, it does not trigger the skill. In those cases, selecting the button opens the KB article form for manual entry.

Before generating articles, confirm that Configure knowledge generation is configured.

Warning:

- For the ServiceNow Otto panel, if property sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled, the article is created using the standard template for cases.
- For Core UI / Workspace, if sn_customerservice.enable_knowledge_kcs and KCS Article Template is not enabled, the **Create Knowledge** button does not appear on the case form.

Your administrator must enable the ServiceNow Otto experience on the Create Article page and configure the following knowledge base generation criteria:

- Activate the KB generation skill.
- In the ServiceNow Otto AI Admin console, confirm that the following criteria are in place:
  - The table record and input fields are specified.
  - The conditions for skill availability are specified from the list of attributes.
  - The knowledge base generation feature is set to display In-product, the panel, or both.
- To manage access to knowledge bases and articles, set permissions that define which users or groups can read or contribute. For more information, see Managing access to knowledge bases and knowledge articles.

Role required: agent

About this task

In the CRM Workspace and classic environment, generate knowledge article information for a case by selecting **Create Knowledge** on the case record. The Use AI to draft this article modal opens. Choose to write the article yourself or draft it with ServiceNow Otto, then review and edit the text.

Note:

The Create Knowledge UI action is available to customer service agents with assigned cases in the Resolve or Close state. You can also generate knowledge article information on demand from the panel. For more information, see Knowledge article generation.

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Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Open a case assigned to you.
   The case must be in the resolved or closed state.
3. Select **Create Knowledge** from the UI actions on the case record.

   Note:

   The **Create Knowledge** UI action is only visible when a case doesn't have an existing knowledge article associated with it.

   For an alternative way to trigger the skill, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.

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 configured in the AI Admin console is used.

5. Select **Create Article**.
6. In the Use AI to draft this article modal, select **Yes, draft with Otto**.
7. **Optional:** In the modal, search for similar cases to include in the article; otherwise, select **Cancel**.
   The completed article is displayed in the chosen template with a success message: `This article was drafted by ServiceNow Otto. Review it for accuracy before saving.`

   Note:

   - If no similar cases exist, this modal doesn't appear and the article is created directly. The generated article is linked to the account case and all selected relevant cases. Similar cases are populated by the AI Search profile titled [KM] Multi-task Article Generation.
   - You can select up to five additional relevant cases in the new modal to generate the article.
   - You can modify the draft before saving. The article appears in a new tab with a unique ID and is attached to the parent record.
   - If the LLM service fails to generate a result, an error message is displayed.
   - After the article generation process is triggered, it can't be stopped. Generation continues even if you close the modal.

8. Select the **Knowledge Base** and the **Language** in the **What language should** *ServiceNow Otto* **draft this article in** dialog.
9. Select **Continue**.
   The article is generated in the selected knowledge base and displayed in the selected language.
10. Select some text in the KB article and then select the ServiceNow Otto icon .
    The icon generates recommended text based on the selected content. Select **Elaborate** or **Shorten** to refine the response.
11. Select **Insert** to add the generated response to the article.

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12. Review the generated article and select **Save** or **Publish**.
    The ServiceNow Otto success message disappears, indicating the article is no longer AI-generated.

    Note: The icon is also available for published KB articles.

Related topics

ServiceNow Otto in Knowledge Management

Summarize a call by using ServiceNow Otto for Customer Service Management (CSM)

Generate a summary of the call conversation between a live agent and a customer by using the call summarization skill in the ServiceNow Otto for Customer Service Management (CSM) application.

Before you begin

To make the skill available in the AI Admin Hub console, install Install ServiceNow Voice applications.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent, sn_csm_agent

About this task

The call summarization skill enables you to do the following actions:

- Summarize calls between live agents and callers when either party ends the interaction.
- Generate a call summary on demand from the ServiceNow Otto panel. For more information, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.
- When real-time transcription is enabled, agents can see a transcript of the voice calls while interacting with the customers. With real-time transcription, an agent gets a better understanding of the customer issues, and a manager gains insights into the customer trends and agent training gaps.
- When real-time transcription is turned off, agents don't see the conversation panel. Once the transcripts are ready, agents can see a ServiceNow Otto banner showing field predictions being generated. Then, another banner shows up with the predicted fields.
- A call summary is available for both outbound and inbound calls. For more information, see Real time transcriptions for ServiceNow Voice for Customer Service Management.
- Dynamic translation is supported for call summarization.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Set your status as Available in CRM Workspace so that you can receive a call request when a customer calls in and requests to speak to an agent.
   The call summarization skill creates an inline summary in the Active Chat window. This summary includes the transcript of the conversation between the agent and the customer.
3. Chat with the customer to get any additional details about their question or issue.
   In the Active Chat window, a transcript of the call conversation with the customer is created. For example, if the customer is having an issue with the hardware, you may need the hardware model number and serial number.
4. **Optional:** If enabled, transfer a call to another agent after accepting an incoming call and do the following actions:

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You must have Advanced Work Assignment set up for an agent-to-agent transfer. For more information, see advanced work assignment setup.

a. From the keypad, select **Quick connects** while you're still connected to the customer.

b. Select the name of another live agent.

c. Select **Call**.

- If the second agent selects **Join**, the second agent joins the conversation with both the first agent and the customer. The customer can have a conversation with both agents.
- If the second agent selects **Swap**, the second agent joins the conversation while the first agent is put on hold. The customer is in a conversation with the second agent only.
- The **Assigned to** field is updated with the new agent's name when the call is transferred from one live agent to another. A summary card of the call is created in the conversation thread.

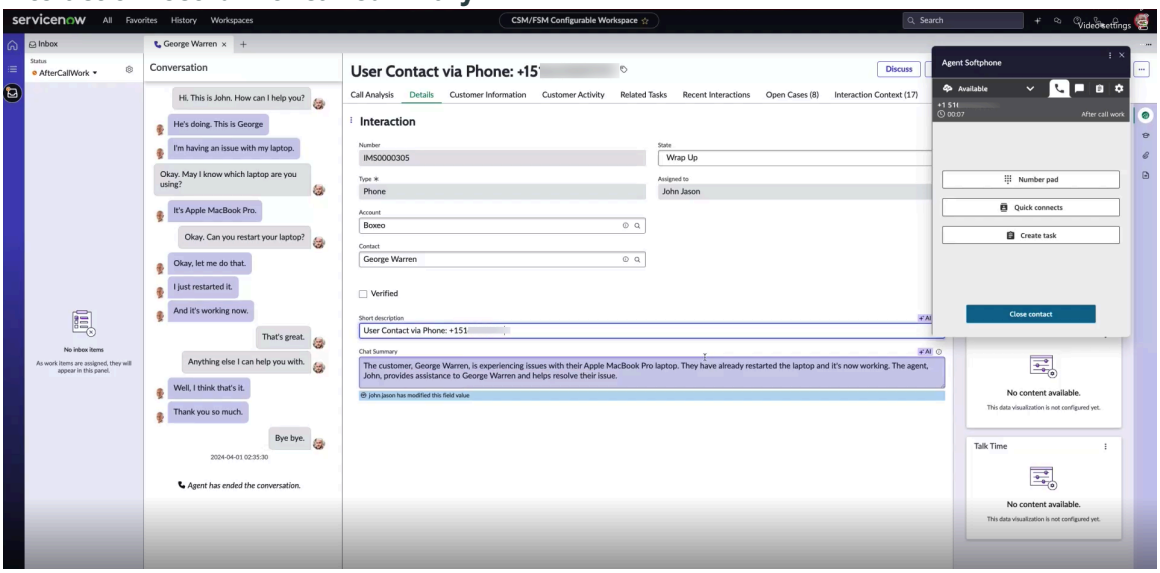
5. End the conversation by selecting **End call**.
   The call summarization skill updates the **Short description** and **Chat Summary** fields on the interaction record when you end the call.

Note:

If a call summary isn't available for the interaction, the **Chat Summary** field doesn't appear on the interaction record.

6. Review the text in the **Short description** and **Chat Summary** fields and make any necessary corrections.
   Because the information in these fields is automatically generated, human review of the text is necessary to ensure its accuracy.
7. Select **Save**.

Interaction record with call summary



What to do next

If necessary, you can create a case from an interaction record. The system uses the information from the **Short description** and **Chat Summary** fields in the interaction record to populate the **Short description** and **Description** fields in the case record.

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The system displays the AI icon ( ) next to these fields and removes the icon if the agent changes the fields and saves the record.

Using conversational search in ServiceNow Otto panel

Get common case-related information from the KBs within the case record by asking questions in the Now Assist panel.

This video shows how to get common case-related information from your Knowledge Bases directly within the case record by asking questions in the ServiceNow Otto panel.

https://player.vimeo.com/video/1167568967?h=baac74ca43&badge=0&autopause=0&player_id=0&app_id=58479

Agent Interaction with the panel and Knowledge Bases (KBs): As an agent, you should be able to ask questions within the panel (NAP) to find any relevant information. If the answer to your question is available in the KBs, it is displayed within the panel. Additionally, the sources from where the information is derived is also shown. If the answer is not available within the KB search, you are redirected to the global search experience.

Benefits

- Efficiency: Agents can quickly find answers without leaving the panel.
- Transparency: Sources of information are clearly indicated, enhancing trust.
- Comprehensive Search: If the answer isn't found in the KBs, agents are redirected to a global search to ensure no information is missed.
- Customer Support: Agents can quickly resolve customer issues by accessing detailed and accurate information and enhancing the customer experience.

To use the feature, do the following:

1. In Core UI or CSM Workspace, open a case that is assigned to you.
2. From the header menu, select the AI icon to open the panel.
3. In the panel, type in a question related to a case.

To get started with configuring the ServiceNow Otto Q&A Skill, see the Configuring Now Assist Admin features instructions.

Using scheduling assistant via GenAI in Virtual Agent

Book, reschedule, and cancel appointments with Virtual Agent conversations using ServiceNow Otto. Setup a new appointment, modify an existing one, or cancel an appointment with a streamlined and user-friendly flow.

Virtual Agent conversations supported by AI uses large language model (LLM) to communicate with customers.

Booking Appointments

To book a new appointment:

1. Initiate the Conversation: The logged-in user contacts your business via your portal. User starts a chat with the Virtual Agent through the ServiceNow Otto panel. The user enters the appointment booking request into the chat, and the Virtual Agent uses large language model (LLM) to understand the request.

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2. Provide Details: The Virtual Agent asks the user to share the necessary details such as the date, time, location and purpose of the appointment. The user chooses the purpose, a location and a date and time slot for the appointment.

   Note: If the time provided by the user has a conflict with the location's calendar, the Virtual Assistant opens the calendar for the requester to choose a new time.

3. Confirm the Appointment: The Virtual Agent confirms the details and books the appointment in the user's calendar.

Rescheduling Appointments

To reschedule an existing appointment:

1. Start the Chat: The logged-in user contacts your business via your portal. The user enters the appointment booking request into the chat, and the Virtual Agent uses large language model (LLM) to understand the request.
2. Specify the Appointment: The user chooses an appointment to reschedule.
3. New Details: The Virtual Agent shares the new dates and times for the rescheduled appointment. User chooses a date and time for the rescheduled appointment.
4. Confirmation: The Virtual Agent updates the calendar and confirms the new appointment details.

Canceling Appointments

To cancel an appointment:

1. Begin the Conversation: The logged-in user contacts your business via your portal. The user enters the appointment booking request into the chat, and the Virtual Agent uses large language model (LLM) to understand the request.
2. Identify the Appointment: User chooses the date and time of the appointment they want to cancel.
3. Confirm Cancellation: The Virtual Agent removes the appointment from the user's calendar and confirm the cancellation.

LLM service confirms that these interactions are smooth and efficient, allowing you to manage your schedule with ease.

Suggested steps generation in ServiceNow Otto for Customer Service Management (CSM)

Generate suggested steps automatically by analyzing clusters of closed cases with similar case resolution in the ServiceNow Otto for Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent

About this task

The system uses data from the **Short description** field and the filter conditions set in the case input table to generate the suggested actions based on similar past resolved cases. These steps outline the next best actions that agents can take as part of resolving cases.

If suggested steps are available for a case, ServiceNow Otto for CSM generates them automatically. The steps display in a card at the top of the Recommended Actions tab in the contextual side panel.

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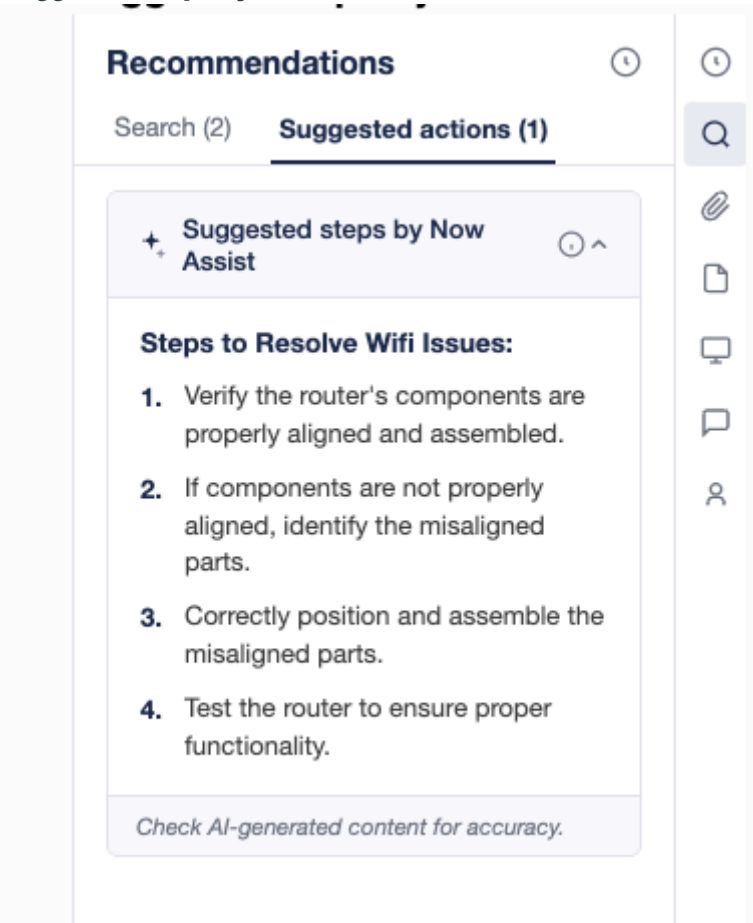
Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Using the List icon , open a case that is not in **Closed** or **Complete** state.
3. Select the Recommendations icon in the contextual side panel to display the Recommended Actions tab.
   The system displays the **Suggested steps by** *Now Assist* card at the top of the tab.
4. In the **Suggested steps by AI** card, select **Generate**.
   The steps to resolve the case appears in the **Recommendations** window in the case record. This action may take a few minutes.

Suggested steps by AI



Note:

Suggested Steps show an AI gradient styling across:

- The sidebar
- The Suggested Steps component
- The Sparkle icon
- The Generate button

These visual updates help users clearly identify AI-generated experiences, creating a more consistent and intuitive interface.

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Analyze sentiments in ServiceNow Otto for Customer Service Management (CSM)

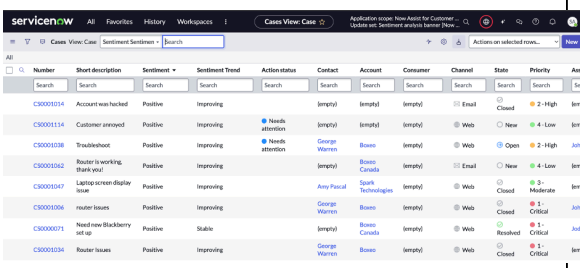
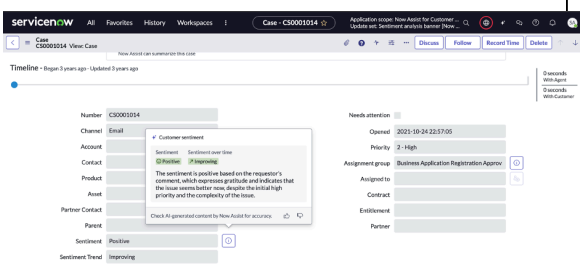
Make informed decisions on cases and email interactions based on requester's sentiment and the reasoning behind it in the ServiceNow Otto for Customer Service Management (CSM) application.

Before you begin

Role required: sn_customerservice_agent and sn_customerservice.consumer_agent role

Procedure

1. Navigate to the case or case form in the Core UI or in CRM Workspace.

To	Do this
Navigate in Core UI	**a.** Go to **All** > **Cases** The case list view appears.  You can analyze the Sentiment and Sentiment trend for the case list. **b.** Select a case. The case form view appears.  **c.** In the Sentiment field, select the information icon ⓘ to see the reasons for the sentiment.
Navigate in CRM Workspace	**a.** Go to **Workspaces** > *CRM Workspace* **b.** Select the List icon ☰. **c.** Go to **Cases** > **Open** The CRM Workspace list view appears.

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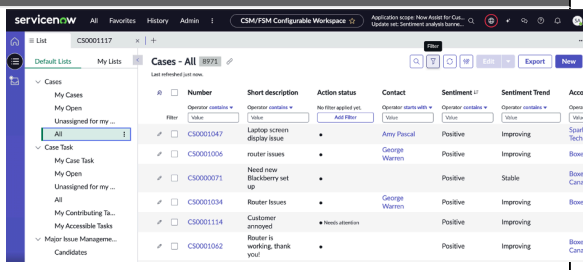
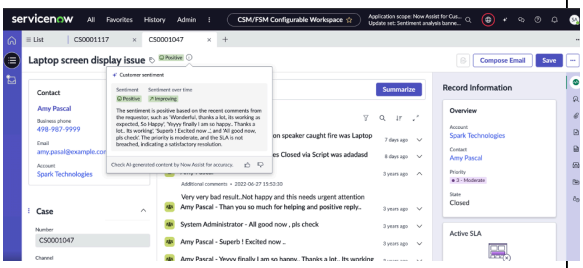
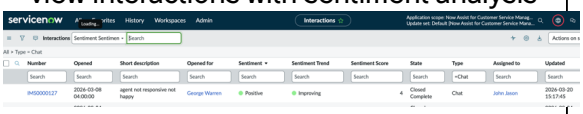
To	Do this
	 **d.** Select a case. The CRM Workspace form view appears.  **e.** Select the information icon ⓘ to see the reasons for the sentiment.

2. Navigate to the interaction or interaction form in Core UI or in CRM Workspace.

To	Do this
Navigate in Core UI	**a.** Go to **All** > **Interaction** The interactions list view appears. ○ Remove the default **My Interactions** filter to see all interactions ○ Apply filter for **Email** interaction type to view interactions with sentiment analysis  You can analyze the Sentiment and Sentiment trend for the interaction list.

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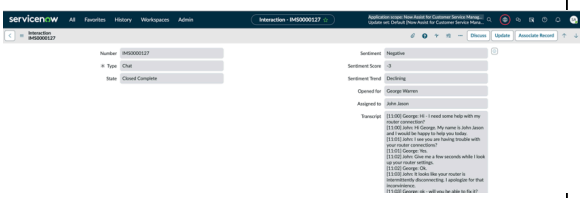
To	Do this
	Important: By default, sentiment and sentiment trend values aren't displayed in the list view, even when the skill is enabled. You must manually personalize the list view to add these columns. To add sentiment columns do the following: **i.** Navigate to the desired list page, for example, case list. **ii.** Right-click the column header and select **List Layout**. **iii.** Search for Sentiment[+], expand it, and move Sentiment and Sentiment Trend to the Selected list. **iv.** Select **Save**.The sentiment columns now appear in the list view. **b.** Select an interaction. The interaction form view appears. 

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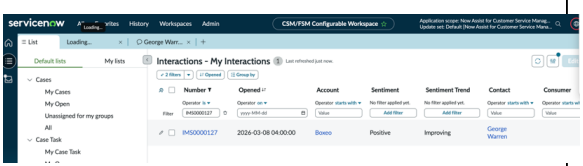
To	Do this
	c. In the Sentiment field, select the information icon ⓘ to see the reasons for the sentiment. **Important:** By default, sentiment and sentiment trend values aren't displayed in the form view, even when the skill is enabled. You must manually personalize the form view to add these columns. To add sentiment columns do the following: **i.** Open an interaction record. **ii.** Select and hold the form header and select **Configure** > **Form Layout**. **Tip:** You must select and hold the list header and select **Configure** > **Form Layout**. **iii.** In the form layout editor, locate the Sentiment section. **iv.** Expand Sentiment(sn_ai_sentiment)+. **v.** Select and drag the fields you want to display on the form: ▪ Sentiment (current sentiment state) ▪ Sentiment Score ▪ Sentiment Trend (declining, improving, stable) ▪ Sentiment Reasoning **vi.** Position the fields in your desired location on the form. **vii.** Save the form layout.
Navigate in CRM Workspace	**a.** Go to **Workspaces** > *`CRM Workspace`* **b.** Select the List icon ☰. **c.** Go to **Interactions** > **My interactions** The CRM Workspace list view for interactions appears.  **d.** Select an interaction.

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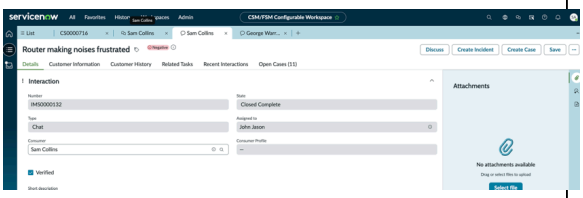
To	Do this
	The CRM Workspace form view appears.  **e.** Select the information icon ⓘ to see the reasons for the sentiment. **Important:** By default, sentiment and sentiment trend values aren't displayed in the list view, even when the skill is enabled. You must manually personalize the list view to add these columns. To add sentiment columns do the following: **i.** Select the list personalization icon. **ii.** Navigate to Sentiment. **iii.** Expand Sentiment(sn_ai_sentiment)+. **iv.** Select the fields to display: ▪ Sentiment (current sentiment state) ▪ Sentiment Score ▪ Sentiment Trend (declining, improving, stable) ▪ Sentiment Reasoning **v.** Save the personalized view.

3. **Optional:** In Core UI or CRM Workspace list view, sort cases and interactions by sentiment scale (Very Positive, Positive, Neutral, Negative, or Very Negative) and sentiment trend.
4. **Optional:** Manually refresh a sentiment.
   a. In the Core UI or in CRM Workspace, enter a comment in the Additional Comments field.
   b. A red dot appears on the information icon ⓘ next to the sentiment.
   c. Select the information icon ⓘ to view the explanation.
   d. Select the refresh icon ↻ to see the updated sentiment scale (Very Positive, Positive, Neutral, Negative, or Very Negative) and sentiment trend.

Related topics

Enable and configure the Sentiment Analysis

Sentiment analysis for email interactions

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Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel

Request generative AI capabilities in the ServiceNow Otto panel, such as chat summaries, case summaries, resolution notes, or knowledge article generation.

Before you begin

Make sure that Next Experience is enabled in the instance. For more information, see Next Experience UI.

Make sure that AI search and Now Assist in Virtual Agent are enabled in the instance for the conversational subflows and actions to work.

Role required: sn_customerservice_agent, sn_customerservice.consumer_agent

About this task

You can use the Now Assist panel in CRM Workspace to request a chat, call or case summary, and generate case resolution notes and knowledge articles. You can also ask questions about a case and use AI agents to complete cases and conversational subflows and actions.

For more information about the Now Assist panel, see ServiceNow Otto panel. For information about activating the panel, see Activate the ServiceNow Otto panel standard chat.

Procedure

1. Navigate to **Workspaces** > *CRM Workspace*.
2. Log in to an instance where the ServiceNow Otto for CSM application is installed.
3. Request the generative AI capabilities in CSM for an interaction or case by selecting the AI icon.

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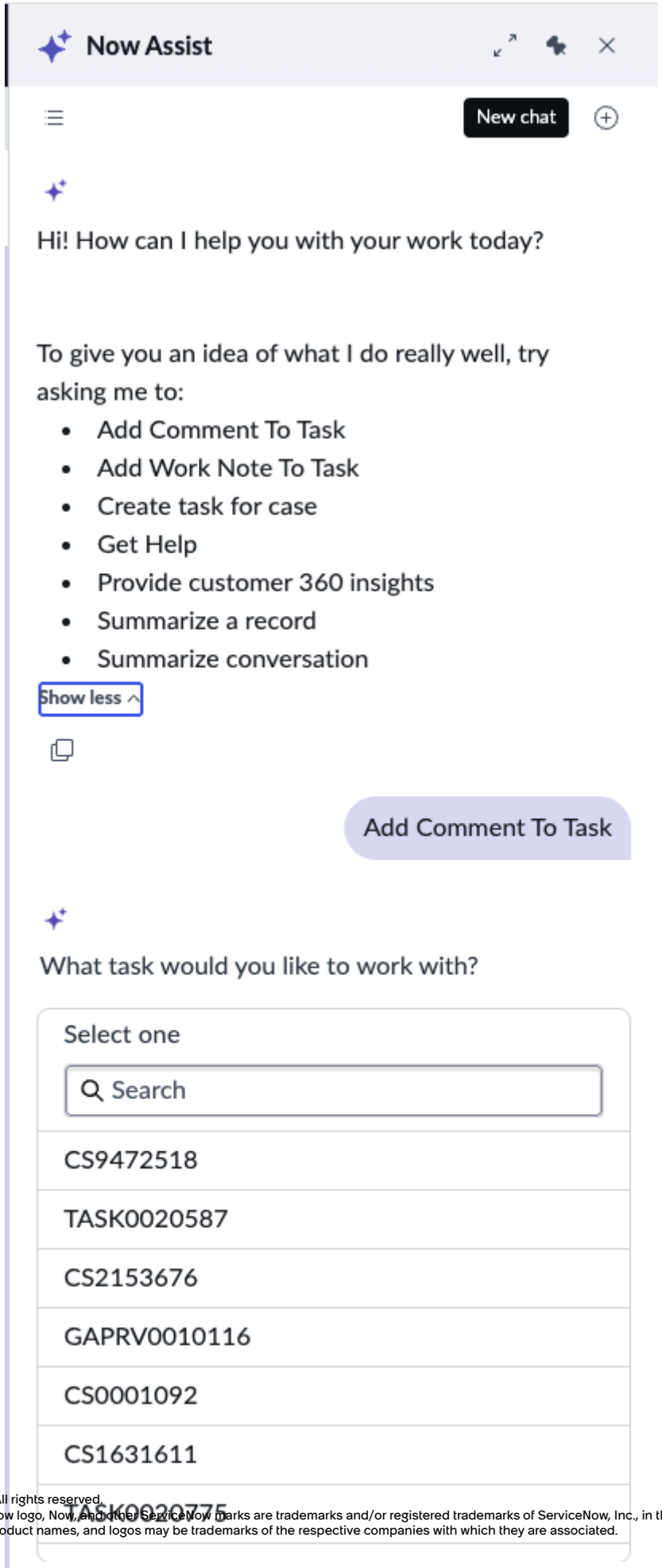
ServiceNow Otto panel



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4. After you request the generative AI capabilities, you can use the following options.

Option	Description
Summarize the chat for an interaction	**a.** Open the interaction. **b.** From the header menu, select the AI icon . **c.** In the panel, select **Chat Summarization**. A summary of the chat conversation with the live agent is displayed.
Summarize the chat for a case that is creat ed from an interaction	**a.** Open the case that was created from an in teraction. **b.** From the header menu, select the AI icon . **c.** In the panel, select **Chat Summarization**. A summary of the chat conversation with the live agent before the case was created is displayed.
Summarize a case	**a.** Open the case. **b.** From the header menu, select the AI icon . **c.** In the panel, select **Summarize a record**.
Generate case resolution notes	**a.** Open the case. **b.** From the header menu, select the AI icon . **c.** In the panel, select **Generate resolution notes**.
Summarize a call	**a.** Open the case. **b.** From the header menu, select the AI icon . **c.** In the panel, select **Summarize conversa tion**. A call summary of the conversation with the live agent is generated on the de tails page.
Generate a knowledge article	**a.** Open the case. **b.** From the header menu, select the AI icon . **c.** In the panel, select **Generate Article**. A knowledge article is drafted for the case us ing task data, comments, and work notes from the activity stream.

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Option	Description
Ask questions about a case	**a.** Open the case. **b.** From the header menu, select the AI icon ✨. **c.** In the panel, enter a case assist topic question and select a case assist topic. Information requested about the case is shown.
Use AI agents to complete cases	**a.** Get notified when an AI agent use case is triggered. **b.** Follow the onscreen instructions to complete the task.

5. You can also use the panel to type in a question related to a case and complete tasks with conversational subflows and actions.

Available actions and subflows	Example questions that can be asked
Action- Add comments to task	I want to add comments to a case
Action- Add work notes to task	I want to add work notes to a case
Subflow- Create task for case	I want to create a task for a case
Subflow- Reassign case	I want to reassign a case

Information requested about the case is shown. Conversational subflows and actions capture users' intents when requesting to run specific subflows and actions, along with all necessary details for those subflows and actions. This streamlines the user experience by enabling them to accomplish everything in one place within the panel.

Use sentiment analysis dashboard

Visualize and interpret customer sentiment across cases using the sentiment analysis dashboard and GenAI insight cards.

The sentiment analysis dashboard provides a comprehensive view of customer sentiment across cases and accounts. It includes visualizations, filters, and GenAI-generated insights to help identify sentiment trends, root causes, and performance across channels and assignment groups.

Entry Point Widget

The sentiment snapshot widget can be accessed from the CRM Workspace and Workforce Optimization home page. It displays a preview of the dashboard of the sentiment trend over time, using the average sentiment score per day. You can access more detailed information by selecting **View dashboard** and navigate to the details page.

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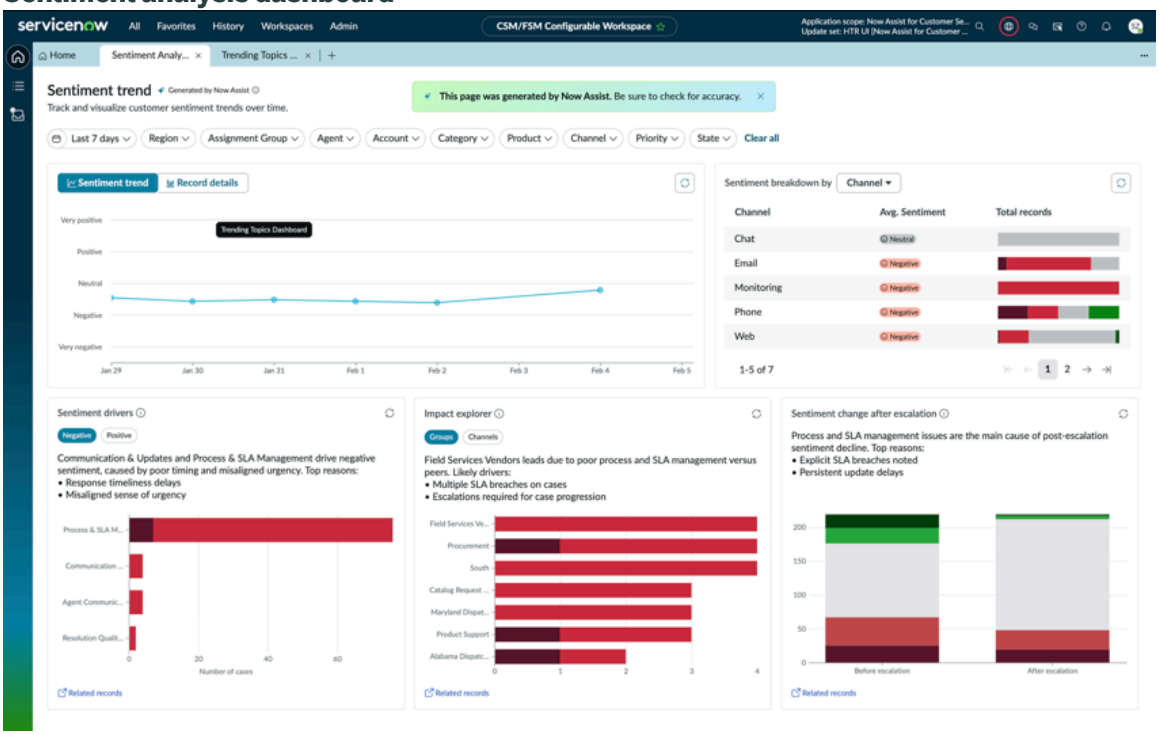
Note:

- The sentiment analysis dashboard can only be managed by customer service managers. The sentiment analysis case skill must be activated so that future cases can pick up sentiment.
- The entry point in Core UI to access the sentiment analysis dashboard is **Customer Service** > **Now Assist Dashboards** > **Sentiment Analysis Dashboard**.

Sentiment analysis dashboard



In-depth View Page – Data Visualizations

Function	Description
Sentiment trend	Displays the average sentiment score per day over time.
Record details	Displays the distribution of cases from very positive up to very negative.
Sentiment breakdown	Displays sentiment breakdown by Region, Assignment Group, Account, Agent, Category, Product, Channel, Priority, State, and also includes average sentiment and total records data.
Bar Chart	Displays sentiment split across categories in **Record details**.
Chart Toggle	Switches between line and bar chart views in **Sentiment trend** and **Record details**.
Time Filters	Supports Last 7 days, Last 30 days, Last 3 months, Last 6 months, and custom range filtering options.

GenAI generated Insight Cards

GenAI insights provide explanations for sentiment trends and root causes in different cases. These insights include:

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- **Sentiment drivers**: Displays the factors that most frequently influence negative customer sentiment. The insight is across the date range and displays a reason why cases in these categories were showing that sentiment.
- **Impact explorer**: Displays the groups impacted by the highest volume of records among the top 10 trends.
- **Sentiment change after escalation**: Displays the comparison of customer sentiment before and after a case escalation.

Note:

- All these insights look into each case's short description and the last 10 days of comments and work notes to generate these insights.
- Select **Related records** to open a new page with a list that shows the corresponding cases referenced in the graph. Select the refresh icon to see the latest update.
- Select **Clear all** to reset the insights to their default state.

AI alerts and gradient theme in dashboard

An AI tagline alert with the AI gradient color theme is available in the dashboard to indicate that these pages are fully generated by ServiceNow Otto. You can dismiss the alert by selecting the X on the banner. This experience is accessible through entry points in both the CSM Manager Workspace and the Workforce Optimization Dashboard.

Related topics

Exploring ServiceNow Otto for Customer Service Management (CSM)

View trending topics dashboard

Identify clusters of related records and visualize their volumes and sentiment trends over time using the trending topics dashboard and GenAI-generated insights.

The trending topics dashboard provides visibility into emerging issues across cases. It includes interactive widgets, filters, and GenAI-generated insights to help identify trends, understand root causes, and improve efficiency.

Widget Overview

Function	Description
Trending Topics Widget	The trending topics widget can be accessed from the CRM Workspace and Workforce Optimization home page and provides an overview of current trends. You can access more detailed information by selecting **View dashboard** and navigate to the details page.
Data Scope	The widget displays topics that have at least one open case and a minimum of two total records.
Interactivity	When you select on a topic, the dashboard opens pre-filtered topic details for that specific topic.
Refresh button	Selecting the **Refresh** icon updates the data for the trends, confirming you have the most current information at your fingertips.
Clear all button	Selecting **Clear all** resets the insights to their default state.

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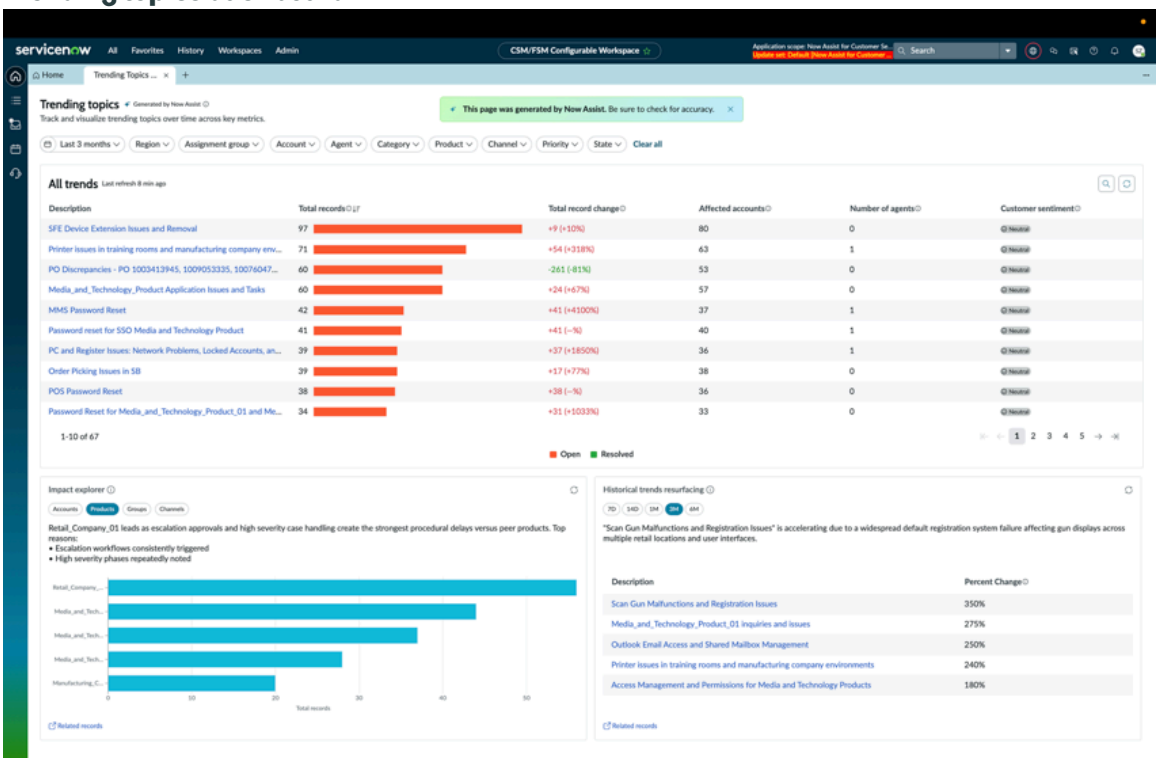
Function	Description
AI alert	Indicates that the pages are fully generated by AI.
Search	Improves information discovery and navigation.
Pagination	Improves performance and user experience by loading and displaying large datasets in smaller, manageable chunks.

In-depth View Page Structure

The in-depth view page shows **Data Visualizations** and **GenAI Insight Cards**.

Trending topics dashboard



Data Visualizations – List View

Displays the top 10 trending topics with the following attributes:

- Topic description
- Total records
- Total record change
- Affected accounts
- Number of agents
- Customer sentiment

Filters include:

- Region, Assignment Group, Account, Agent, Category, Product, Channel, Priority, State
- Time period: Last 7 days, Last 6 months, Last 30 days, Last 3 months, Last 12 months, and Custom range

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You can select a topic description link to view trends over time in more detail based on the following filters:

- Region, Assignment Group, Account, Agent, Category, Product, Channel, Priority, State.
- Time period: Last 7 days, Last 6 months, Last 30 days, Last 3 months, Last 12 months, and Custom range

The dashboard provides several key features to analyze and understand record trends and case status.

Trend over time:

- Record Trend Chart: Visualize the total records on a specific date.
- Record Details Chart: Examine the case status of various cases on a particular date.

Trend Breakdown: Trend analysis can be segmented by multiple categories, including, Region, Assignment Group Account Agent Category Product Channel Priority State.

Affected regions trend insights: For each region, you can view:

- Average trend score
- Record count by trend bucket

This breakdown shows trends across different dimensions and regions.

GenAI generated Insight Cards

Automatically generated insights give you information about general trends and include:

- **Impact explorer**- Displays accounts, products, assignment groups, and channels that are impacted by the highest volume of records among the top 10 trends.
- **Historical trends resurfacing**- Displays trends that didn't have any open records in the last year and recently resurfaced open records.

You can select **Related record** to open a new page with a list that shows the corresponding cases referenced in the graph and select the refresh icon to see the most recent update.

AI alerts and gradient theme in dashboard

An AI tagline alert with the AI gradient color theme is available in the dashboard to indicate that these pages are fully generated by AI. You can dismiss the alert by selecting the X on the banner. This experience is accessible through entry points in both the CSM Manager Workspace and the Workforce Optimization Dashboard.

Related topics

Configure trending topics dashboard

Generate activity stream responses

Generate recommendations for work notes or comments in a case record using ServiceNow Otto and add them to enhance the quality of your interactions with the user.

Before you begin

These skills are inactive by default. Your administrator must enable the skills that you want to use.

Role required: sn_customerservice_agent or sn_customerservice.consumer_agent

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Procedure

1. Navigate to a case record in the CSM/FSM Configurable Workspace or Core UI where you want to generate work notes or comments using ServiceNow Otto.
2. Select **Compose**, then select **Compose Comments** or **Compose Work Notes** from the drop down in front line case page.
   If you haven't switched to the front line case page, you can also do the same actions in **Work notes** or **Comments** tabs.

   a. Select the Sparkle icon ✦.

      The following four options appear:

      - **Acknowledge task**: Confirm receipt and understanding of the customer's request or issue.
      - **Follow up**: Reconnect with the customer to check progress or ensure resolution.
      - **Post response**: Provide a clear, timely reply to the customer's query or concern.
      - **Summarize actions taken**: Create a summary of all steps taken to resolve the case.

      Note: The options display based on the configurations by your admin. Under work notes only 3 options are available – Post response, Summarize actions taken and Follow up.

   b. Select one of the options based on the type of response you want AI to generate.
      The response appears in the ServiceNow Otto Context Menu (NACM).

   c. You can select the **Refine** menu and elaborate, shorten, or change the tone of the response.

3. Select **Insert**.

Related topics

Configure activity response generation

Use automated quality assurance dashboard as a live agent

The automated quality assurance dashboard provides GenAI-generated quality insights for individual agents, including time-based filters, trend analysis, category and parameter breakdowns, with a detailed list of reviewed cases.

Overview of automated quality assurance dashboard

The automated quality assurance dashboard is accessible from the CSM workspace landing page. An alert with an AI gradient theme indicates that page content is generated by AI. The dashboard focuses on individual live agent data, summarizing average QA score and cases reviewed, exposing trends based on QA score and category, and providing breakdown views across categories and parameters.

Live agent Access

Live agents have limited access to QA reviews:

- **Permitted:** Live agent can view QA data only if the skill is enabled by an admin, live agent role is selected in the skill configuration, and the case was closed by that live agent.
- **Restricted:** Live agents cannot access QA reviews for cases closed by other live agents.

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Dashboard Overview

When you select the entry point, the **Automated quality assurance** tab opens. The dashboard presents comprehensive quality metrics and insights specific to the logged-in live agent's performance.

Dashboard Components

Widget	Description
Alert Indicator	Displays an AI gradient theme to indicate AI-generated content.
Average QA Score	Summary metric showing the live agent's average quality assurance score.
Cases Reviewed	Total count of cases that have undergone quality assurance review.

Trends Analysis

The dashboard enables viewing of **Average QA score** and **Cases reviewed** metrics across multiple time ranges. Predefined time periods include Last 7 days, Last 30 days, Last month, Last quarter, Last 6 months, Last 12 months, and Last year. Custom date ranges are also supported.

The **Trends** section displays QA score and category trends with drill-down granularity options available at daily, weekly, monthly, quarterly, and yearly levels.

Breakdown Analysis

The **Breakdown** section presents category-level and parameter-level performance data. Scores are displayed for each category and parameter, providing visibility into strengths and improvement opportunities. Categories can be expanded to reveal individual parameter scores nested within each category.

Widget	Description
Category Breakdown	Displays quality scores organized by quality assurance category.
Parameter Breakdown	Shows individual parameter scores within each expanded category.

Reviewed Cases List

The **Reviewed cases** list provides rich data exploration capabilities with filtering, sorting, and grouping functionality. Users can focus on specific review outcomes or time ranges. The data can be exported in PDF, JPG, or CSV formats.

Widget	Description
Filter	Allows filtering of reviewed cases by specific criteria
Sort	Enables sorting of case data by various fields
Group By	Supports grouping of cases for organized viewing

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Widget	Description
Export	Provides export capabilities in PDF, JPG, and CSV formats
Alert with AI gradient color theme	Highlights that the pages are fully generated by AI. You can dismiss the alert by selecting the X on the alert banner.

Use automated quality assurance dashboard as a manager

Access the automated quality assurance dashboard from the CRM Workspace to view detailed agent performance metrics and quality assurance scoring data.

Before you begin

Role required: Manager

Before you begin, confirm you have:

- Manager role permissions in CSM
- Access to the CRM Workspace

About this task

The automated quality assurance (QA) dashboard provides managers with detailed insights into individual agent performance metrics. This view displays comprehensive QA scoring data at both the agent and case levels, enabling you to monitor, evaluate, and provide feedback on agent interactions.

The automated quality assurance widget serves as an entry point to access the quality assurance supervisor dashboard and is available on the CRM Workspace.

Procedure

1. Log in to CRM Workspace.
2. Navigate to the dashboard.
   The dashboard displays various widgets and tools relevant to your management responsibilities.
3. Locate the **Quality assurance (QA)** widget on your dashboard.
   The widget typically displays a summary of recent quality assessment data, including key metrics such as average quality scores and evaluation counts.
4. Select **View dashboard** in the widget to access the detailed quality reports.
   The automated quality assurance dashboard opens, providing access to comprehensive quality assurance tools and reports.
5. Review the quality reports for your agents.

   You can perform the following actions on the dashboard.

   - View individual agent quality scores and evaluations
   - Filter reports by date range, agent, or quality parameters
   - Analyze trends in quality performance over time
   - Identify coaching opportunities based on quality assessment results
   - Export reports for further analysis or documentation

Result

From the quality assurance dashboard, you can monitor team performance, review quality metrics, and manage quality assurance processes.

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The Agent's table presents average Auto QA scores and category scores for each agent. Each category score represents the average of all parameters within that category.

You can use the following features to manage data:

- **Filters:** Use the condition builder to filter by any column
- **Group By:** Organize data by any column
- **Sort:** Arrange data by any column
- **Search:** Find specific information across columns
- **Export:** Download data as PDF, JPG, or CSV

Note:

- Agent performance is rated on a 1-5 scale with color-coded visual indicators. Managers can modify any parameter score as needed.
- When AI-generated content is present, an alert indicator and AI tagline appear at the top of the review. When you manually edit parameter scores or feedback, the AI tagline is removed and the card component switches to a standard card.
- When navigating from the dashboard to the case-level view, managers can perform actions such as viewing detailed feedback for a specific case and editing QA parameters to adjust scores for individual evaluation parameters.
- The Category Trend Analysis view includes a drop down where one category is selected by default. Managers can choose any category from the drop down to view its performance trends. Once selected, the trend data updates to display the chosen category's score over time.
- AI alert with AI gradient color theme highlights that the pages are fully generated by AI. You can dismiss the alert by selecting the X on the alert banner.

Create a case based on service definition recommendations

Use ServiceNow Otto to view AI-predicted service recommendations based on the context of an interaction record, such as the short description or description, and create cases based on these recommendations.

Before you begin

These skills are inactive by default. Your administrator must enable the skills that you want to use.

Role required: sn_esm_agent

Procedure

1. Navigate to an interaction record in the CRM Workspace or Core UI where you want to create a case based on a service recommendation using ServiceNow Otto.
2. Select **Create Case.**
   The case type selector modal displays, with the **AI predictions** section at the top of the modal.
3. Select a service from the AI predictions, and then select **Create case**.
   A case is created for the selected service.

Using Troubleshooting steps identification AI agent

The Troubleshooting steps identification AI agent fetches the context from a case, identifies the missing context by comparing it with knowledge articles, similar cases, and standard operating documents, and then proposes additional troubleshooting steps.

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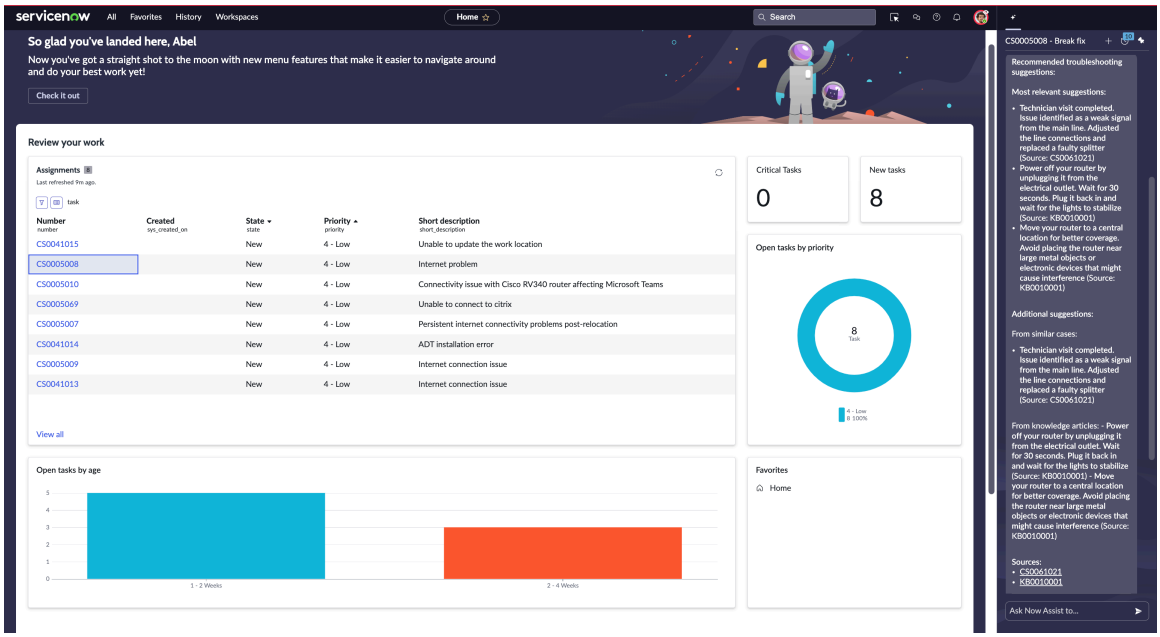
Troubleshooting steps identification AI agent overview



This agent is typically used in standalone mode. Any agentic workflow that interacts with Customer Service Management (CSM) cases can use it.

This AI agent does the following actions:

- Gathers the context from the case, including the attempted steps.
- Identifies the missing context by analyzing the similar cases, knowledge base articles, and Standard Operating Procedure (SOP) documents that are attached to knowledge base articles.
- Proposes additional troubleshooting steps.

Agentic workflows can access this AI agent in Core UI or CSM/FSM workspace.

Configure AI Search for the Troubleshooting steps identification AI agent

You must configure AI Search so that this AI agent can fetch similar cases and relevant knowledge articles For more information, see Configure AI Search to use with the Troubleshooting steps identification AI agent and Configure the Troubleshooting steps identification AI agent to use the Search retrieval tool.

Limitations

The document types supported for AI Search and document processing are:

- Microsoft Word (.docx)
- Plain Text (.txt)
- Portable Document Format (.pdf)

When fetching text from knowledge articles, this AI agent can fetch only the **article_body** field from the kb_knowledge table.

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Related topics

- AI Agent Studio overview
- Find AI agents
- AI Agent Studio (legacy)
- Install ServiceNow Otto AI Agents

Using agentic AI in ServiceNow Otto for Customer Service Management (CSM)

The Customer Service Management (CSM) AI Agent Collection provides a set of prebuilt, fully configured AI agents and agentic workflows to address common Customer Service Management scenarios.

These model examples combine autonomous and supervised flows to perform multi-step actions using advanced reasoning, triggered by customer cases, conversations, or detected intents. Built on the ServiceNow AI Platform, the agents use capabilities such as Knowledge Graph, Flow Designer, scripting, Topics, and Catalog Items. They also use Retrieval-Augmented Generation (RAG), record operations, web search, and generative inputs. Powered by AI Agent Fabric and Workflow Data Fabric, the collection operates seamlessly across systems without dependency on data location, while Guardian enforces guardrails for security and conformance. By offering ready-to-use building blocks, it helps guide and automate complex processes, reduce agent friction, and free human agents to focus on higher-value work. This ultimately accelerates resolution times and enhances customer experience.

Available agentic workflows for Customer Service Management agent collection

Agentic workflow	Description	Available AI agents
Triage cases	Handles end-to-end case or case type validation, creation, verification, and escalation. It can also retrieve relevant context and details from the provided case or interaction to address customer inquiries directly and avoid unnecessary case creation.	• Triage cases WrapUp • Context validator • Informational queries • Case creation • Entity extraction • Document verification • Email response
Provide customer 360 insights	Provides agents with real-time, context-aware responses to queries on customer data, case details, product information, catalog entries, and interaction history. Uses multi-turn Q&A to maintain conversational context and accuracy.	• Customer insight AI Agent • Case action AI Agent

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Available agentic workflows for Customer Service Management agent collection (continued)

Agentic workflow	Description	Available AI agents
Complaint Case AI Agent collection	Automate and enhance the complaint resolution process by gathering missing information, detecting customer sentiment, categorizing complaints, and proposing resolutions. It supports human agents by managing complaint intake, triage, research, resolution, and ongoing communication, reducing manual effort and case closure time.	• Complaint case intake agent • Complaint case triage agent • Complaint case research agent

Supported Large Language Models

Note:

You can use Now LLM Service, Azure OpenAI, Google Gemini or Anthropic Claude on AWS as the AI model provider for all generative AI 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 AI Admin Hub console. For more information, see Large language models on the ServiceNow AI Platform.

For the Now LLM Service updates, see Model provider updates.

Security implementation considerations

Enable security implementation to execute AI agents and agentic workflows through Access Control Lists (ACLs) and user identities. For more information, see Implement access control in AI agents

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your 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.

AI agents use role masking to determine which users can access them. Ones installed with your 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 AI agent.

Considerations for running the autonomous 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:

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- 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.
- Azure OpenAI is recommended for CSM agentic workflows. For information on Large Language Models (LLMs) for AI agents and agentic workflows, see Large language models on the ServiceNow AI Platform.

Standalone AI agents

There might be AI agents installed on your instance 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 Management AI agent collection triage cases agentic workflow

Use CSM AI agents agentic workflow to process all routine cases coming in through email and other offline channels and increase agent productivity through faster resolution.

Triage cases overview

Using the Triage cases agentic workflow, handle end-to-end validation, creation, verification, and escalation of cases or case types. Get the correct information from the case or interaction to answer customer questions directly and reduce the number of cases that must be created.

Refer to the information provided here on agents, tools, and triggers that are related to the Triage cases agentic workflow in AI agents for Customer Service Management.

To modify the Triage cases agentic workflow duplicate it, and adjust the settings according to your requirements. You can activate the agentic workflow template by making triggers active and setting the display settings to include the ServiceNow Otto panel.

> **Important:** When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

Triage cases agentic workflow

Triage and provide faster resolution for all the routine cases coming in through email and other offline channels.

To access the agentic workflow:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage.**
2. Select **Triage cases**.

Access control lists (ACLs)

Access Control Lists (ACLs) are preconfigured to support the Triage use case, including AI agents and their associated flows and actions, such as the Document Verification Agent. By default, ACLs are configured for the sn_esm_agent role. Customers can modify these ACLs to align with their specific business requirements and security policies. For more information, Configure security controls for a skill.

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When updating the agent role for the Triage Cases Agentic Workflow, it's important to also update the corresponding Access Control Lists (ACLs) to ensure proper permissions. To manually update ACLs for custom roles:

1. Go to the **sys_security_acl** table.
2. Use filters to locate ACLs related to your use case, AI agent, and internal flows or actions.
3. Add your custom role to each relevant ACL record.

Triage cases AI agents

The following tables list the agents that are used in the Triage cases agentic workflow.

Important: In the **Define availability** screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

AI agents and their roles in the Triage cases agentic workflow

AI agent	AI agent role
Triage cases WrapUp	Wrap up the case triage process using the Triage Cases Wrapup AI Agent. It synthesizes the execution details and posts the summary to the work notes of the source record to ensure traceability and closure.
Context validator	Validate the content of a record using the Context Validator AI Agent. It analyzes sentiment and identifies a list of intents from the input record. Invoke this agent whenever record content requires validation and intent classification.
Informational queries	Create a summary of all answers related to informational intent using the Informational Queries AI Agent. It retrieves a list of all intents, then processes each informational intent individually before generating the final summary. Invoke this agent whenever a consolidated response to informational queries is required.
Case creation	Automate and manage the end-to-end process of case creation using the Case creation AI agent. Invoke this agent whenever a case needs to be created.
Entity extraction	Extract entities from emails and documents using the Entity Extraction AI Agent. It matches the extracted entities against a predefined allowlist of fields to ensure relevance and accuracy. Invoke this agent whenever entity-level information needs to be identified and structured from unstructured content.
Document verification	Verify documents on a record using the Document Verification AI Agent to determine whether they match the required list for the case type. It identifies any missing documents

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AI agents and their roles in the Triage cases agentic workflow (continued)

AI agent	AI agent role
	or verification failures. Invoke this agent whenever document validation is needed.
Email response	Generate and send email responses using the Email Response AI Agent. It acts as a response assistant to draft, display, and deliver email replies. Invoke this agent whenever an automated email response is required.

Role masking

Required role: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent)

Important: To access data in the agentic workflow, the admin role must include the specified roles under **Contains roles**.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your 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.

In the data access settings, you must also add the necessary roles to access the cases that need triaging. For example, you can add the csm role to the agentic workflow's list of approved roles so that it can access case records.

Triaging the case

In the triaging the case agentic workflow, perform the following steps:

1. In **Define key requirements** the workflow's purpose is clearly described and its steps with specific actions and criteria for each is outlined.
2. In the **Define security controls** screen, you can set the access at user and data level.

   a. **Define user access**: Specify which users can access and interact with the agentic workflow. Once you save your selections, the system automatically generates an Access Control List (ACL).

   b. **Define data access**: Choose the user identity under which the Provide customer 360 insights agentic workflow will run. This determines the roles and associated data access permissions.

   Note: Choose the user identity this agentic workflow should run as to determine the roles and the data access permissions derived from them. Remember, when agentic workflows can access data, they can also share that data with the human user who interacts with them. Agent level role mask are: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent).

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a. In **Add triggers** you can set up optional triggers to launch the agentic workflow automatically without a user request. Triggers can be based on conditions or schedules you define and initiate agentic AI experiences.

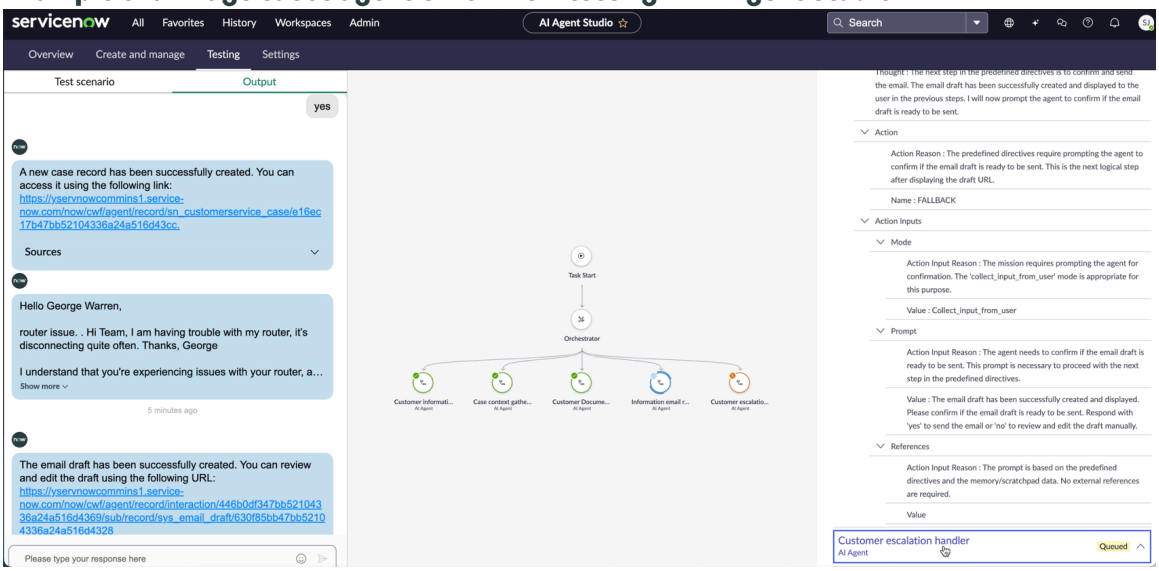
b. In **Select channels and status**, you can choose the channels where this agentic workflow will be available to engage with users who initiate interactions. Toggle the display for **Engage via the ServiceNow Otto panel** to see the agentic flow in ServiceNow Otto panel.

> **Note:** To turn off the agentic workflow, toggle off **Engage via the ServiceNow Otto panel**.

c. Select **Save and test**.

The agent executes the **testing** in AI Agent Studio for the agentic workflow.

Example of a Triage cases agentic workflow testing in AI Agent Studio



In the Now Assist panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.

Customer Service Management AI agent collection provide customer 360 insights

Provide Customer 360 insights agentic workflow is a GenAI-powered assistant that helps agents answer natural language questions about customers, cases, products, catalogs, and past interactions with a seamless multi-turn Q & A experience.

This workflow enables agents to retrieve case details, customer information, and perform actions such as case creation, modification, escalation, and closure using natural language queries. It supports real-time context-aware responses and respects role-based access controls.

Provide customer 360 insights agentic workflow overview

The Provide Customer 360 insights agentic workflow is a GenAI-powered assistant that helps agents resolve cases more efficiently and effectively. By answering natural language questions about customers, cases, products, catalogs and past interactions, it provides contextual insights

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that enable agents to make informed decisions and solve issues faster. It provides a seamless, multi-turn Q&A experience, helping agents to:

- Ask follow-up questions and get context-aware responses in real-time.
- Access critical customer details and history to make informed decisions.

This feature consolidates scattered user and case data, providing agents with timely, accurate insights to make informed decisions, reducing Mean Time To Resolve (MTTR) and helping to solve issues. If something isn't found, the GenAI responds clearly. For example, "I couldn't find any recent catalog interactions for this customer". If the question is outside its scope, it redirects.

Provide Customer 360 insights agentic workflow

Customer 360 insights agentic workflow is set up as a promoted asset in the ServiceNow Otto panel.

This workflow manages all case-related queries and actions, including retrieval of case details, history, timelines, assignments, status, customer information, sentiment analysis, related cases, knowledge articles, and case updates. It supports natural language requests for specific case numbers, aggregates comprehensive case and customer data, analyzes historical patterns and sentiment, and executes case management operations such as creation, modification, escalation, and closure.

Role masking

Required role: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent)

> **Important:** To access data in the agentic workflow, the admin role must include the specified roles under **Contains roles**.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your 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.

In the data access settings, you must also add the necessary roles to helps agents resolve cases more efficiently and effectively. For example, you can add the csm role to the agentic workflow's list of approved roles so that it can access case records.

Setup Provide customer 360 insights Agentic Workflow

To configure the Provide customer 360 insights agentic workflow, perform the following steps:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Provide Customer 360 insights**.
3. In **Define key requirements** the workflow's purpose is clearly described and its steps with specific actions and criteria for each is outlined.
4. In **Define security controls** you can set the access at user and data level.

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a. **Define user access**: Specify which users can access and interact with the agentic workflow. Once you save your selections, the system automatically generates an Access Control List (ACL).

b. **Define data access**: Choose the user identity under which the Provide customer 360 insights agentic workflow will run. This determines the roles and associated data access permissions.

> **Note:** Choose the user identity this agentic workflow should run as to determine the roles and the data access permissions derived from them. Remember, when agentic workflows can access data, they can also share that data with the human user who interacts with them. Agent level role mask are: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent).

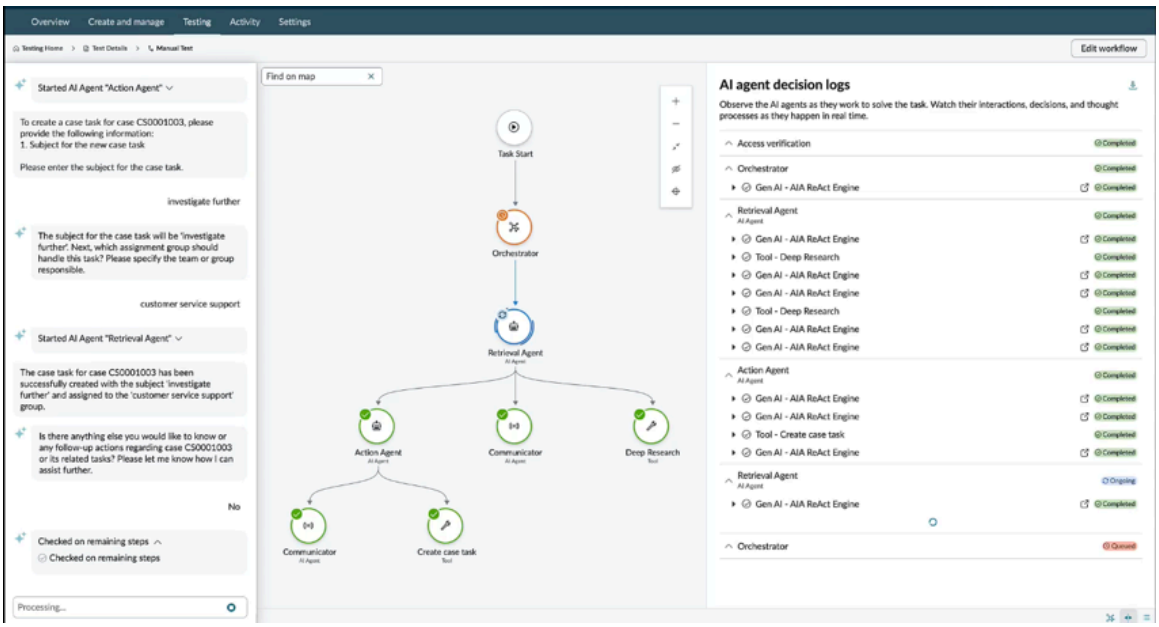
5. In **Add triggers** you can set up optional triggers to launch the agentic workflow automatically without a user request. Triggers can be based on conditions or schedules you define and initiate agentic AI experiences.
6. In **Select channels and status**, you can choose the channels where this agentic workflow will be available to engage with users who initiate interactions. Toggle the display for **Engage via the ServiceNow Otto panel** to see the agentic flow in the panel.

> **Note:** To turn off the agentic workflow, toggle off **Engage via the ServiceNow Otto panel**.

7. Select **Save and test**.

The agent executes the **testing** in AI Agent Studio for the agentic workflow.

Example of Provide customer 360 insight agentic workflow testing in AI Agent Studio



In the Now Assist panel, the agent receives a notification as soon as the interaction is generated, which enables them to follow the on-screen instructions and complete the task. For more information, see Request the generative AI capabilities in Customer Service Management by using the ServiceNow Otto panel.

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Access Control lists (ACLs)

Access Control Lists (ACLs) are preconfigured to support the Provide customer 360 insights use case, including AI agents and their associated flows and actions, such as the Customer insights Agent. By default, ACLs are configured for the sn_esm_agent role. Customers can modify these ACLs to align with their specific business requirements and security policies. For more information, Configure security controls for a skill.

When updating the agent role for the Provide customer 360 insights Agentic Workflow, it is important to also update the corresponding Access Control Lists (ACLs) to ensure proper permissions. To manually update ACLs for custom roles:

1. Go to the **sys_security_acl** table.
2. Use filters to locate ACLs related to your use case, AI agent, and internal flows or actions.
3. Add your custom role to each relevant ACL record.

AI agents used in Provide customer 360 insights agentic workflow

The following tables list the agents that are used in the Provide customer 360 insights agentic workflow.

AI agents and their roles in the Provide customer 360 insights agentic workflow

AI agent	Actions
Case action AI Agent	Perform customer-related actions, including case operations such as creating case tasks and updating work notes.
Customer insight AI Agent	Answer questions related to the record by retrieving comprehensive information, including customer details (name, contact info, location, history, cases, orders) and case data (next steps, actions, assigned agent, notes, documents, tasks, resolutions), along with other relevant attributes.

Use Provide customer 360 insights Agentic Workflow

The Provide customer 360 insights agentic workflow in ServiceNow Otto for Customer Service Management (CSM) gives agents contextual, GenAI-driven insights about customers directly within a case. By selecting the AI icon in a case record, agents can access the panel that delivers real-time insights based on customer data.

Agents can ask natural language questions, such as "What products is this customer currently using?" The AI agent responds with accurate, contextually relevant answers. The AI agent maintains conversational context across multiple questions.

Key features

Feature	Details
Contextual Insights	AI retrieves and summarizes information from multiple sources, including:

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Key features (continued)

Feature	Details
	• Case details (status, priority, age, assignees, notes). • Customer info (account details, recent activity). • Products and services they own. • Catalog items they interacted with. • Past interactions (calls, chats, emails). • Actions taken (resolution steps, escalations, KBs shared).
Handling	If data is unavailable or ambiguous, AI communicates clearly, for example, I couldn't find any recent catalog interactions for this customer. For out-of-scope questions GenAI declines and redirects.
Security	GenAI respects role-based access controls and does not surface restricted information.
Feedback Loop	Agents can give thumbs up or thumbs down or flag inaccurate responses for retraining.
Enterprise Graph	Enables the agent to connect the case table with one related table at a time in natural language queries- without requiring SQL or schema knowledge.

Customer Service Management accelerate complaint case handling AI agent collection

The Accelerate complaint case handling agents can work alongside human complaint agents to intake complaints, triage complaints, summarize cases, and answer research queries. The agents review previously attempted troubleshooting steps and propose resolution plans based on similar complaint cases or knowledge articles.

The Accelerate complaint case handling collection includes AI agents and a specialized AI workflow that systematically analyzes complaint cases, determines optimal processing paths, and coordinates seamless hand-offs between specialized sub-agents. This agent excels at complaint intake, contextual triage, prioritization logic, and ensuring comprehensive case resolution based on case state, complexity factors, and historical resolution patterns.

AI agents used in the Accelerate complaint case handling collection and the Accelerate complaint case handling agentic workflow

The accelerate complaint case handling collection and agentic workflow uses a team of AI agents and skills to triage customer complaints, summarize cases, and help research customer cases. The complaint case intake agent is not part of the agentic workflow, since it is used with Virtual Agent.

To install the AI agents and skills for the Accelerate complaint case handling collection, see Install the Now Assist for Complaint Case (CSM) application.

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For more information on configuring the Accelerate complaint case handling agentic workflow, see Configure the Accelerate Complaint Case Handling agentic workflow.

AI agents and skills and their roles listed in the order of execution

Agent	Description
Complaint case intake agent	Manages customer complaints by collecting relevant information, such as customer details, the nature of the complaint, and any supporting documentation, before initiating the resolution process.
Complaint case triage agent	Derives category, subcategory, and priority of the case. The agent also analyzes tone, sentiment, word choice, and speech patterns to detect frustration of the customers. It uses this information to determine the priority of the case.
Complaint case research agent	Helps the human agent by providing the best answer to research queries. It retrieves relevant knowledge base articles and similar cases, and if needed, gets relevant information from other systems to give accurate answers and create case tasks based on the context.
Complaint case summarization skill	Produces structured summaries of complaint cases surfacing complaint-specific context, including the product or location at the center of the complaint, related parties involved, key actions taken, and SLA urgency ranked by time remaining. The skill allows agents to understand the full complaint picture without reading through the entire activity stream. It is especially valuable during complaint intake reviews, escalations, cross-team handoffs, or when returning to an active complaint after a period of inactivity.

Install the Now Assist for Complaint Case (CSM) application

You can install the Now Assist for Complaint Case (CSM) application (sn_cmpl_gen_ai) if you have the admin role.The application installs related ServiceNow® Store applications and plugins if they are not 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.
- Review the Complaint Case AI Agents collection application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

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About this task

The following item is installed with Now Assist for Complaint Case (CSM): Plugin: Complaint Case AI Agent collection (sn_complaint_ai)

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Now Assist for Complaint Case (CSM) application (sn_cmpl_gen_ai) using the filter criteria and search bar.

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

   A list of the versions available to you are displayed.
3. Select a version from the list and select **Install**.

   In the Review Installation Details dialog box, any dependencies installed with your application are listed.
4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Select **Install**.

Configure the Accelerate Complaint Case Handling agentic workflow

Configure the Accelerate Complaint Case Handling agentic workflow by defining key requirements and security controls. The workflow is then tested and made available through various channels.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Create and manage.**.
2. Select **Accelerate Complaint Case Handling**.
3. Define the key requirements.
   For more information on defining key requirements, refer to General guidelines for writing prompts for agentic AI .
   a. Write a clear description and list of steps.
   b. Add AI agents that can perform these steps or ask ServiceNow Otto to suggest AI agents.
   c. From the list, select any LLM providers that this agentic workflow does not support.
   d. Select **Save and continue**.
4. Define the security controls for this workflow.

   a. Define user access.
      These include the following:
      - Any authenticated user: Any logged-in user can access this AI agent.
      - Users with specific roles: select specific roles that can access this AI agent.
      - Public: anyone can access this AI agent, even if they are not logged in.

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b. Define data access: Select the user identity type this agentic workflow will run as. These include the following:

- Dynamic user: This can be the sys_user of a trigger, agentic workflow, or user that passes its roles to this AI agent.
- AI user: This is a type of sys_user only for agentic workflows and AI agents, with pre-defined roles.

c. Select **Save and continue**.

5. **Optional:** Add triggers.

   (Optional) You can add triggers if you want an agentic workflow or AI agent to launch according to pre-defined rules, and you want to spare your users the effort of reaching out for help, add a trigger.

   If you do not add triggers, the workflow executes only in response to users' requests for help.

6. Select channels and status.

   Select the channels where you want this agentic workflow to be available for users.

   - Engage via the ServiceNow Otto panel: When users send a message to ServiceNow Otto, they can discover and use this workflow.
   - Engage via UI actions on specific records: When users select a UI action displayed on certain records, this workflow is activated.

7. Select **Save and test**.

AI voice agents in CSM

Use the AI voice agents to create cases and check case status through natural, conversational voice calls.

AI voice agents overview

The AI voice agents streamlines customer interactions by integrating with contact center platforms including Genesys, Twilio, NICE, Five9, 3CLogic, and Amazon Connect.

The AI voice agents enables customers to get case status and create cases entirely through voice commands. This solution reduces manual intervention, improves service resolution times, and delivers consistent functionality across all supported contact center partners.

Key Capabilities

The AI voice agents helps with case management by using natural, conversational voice interactions:

- Check the status of your cases just by asking.
- Create cases without filling out any forms.
- If an issue is complicated, the agent can quickly connect you to a human.
- It supports multiple languages, making it easy for customers around the world to use.

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- All interactions are recorded for auditing and quality checks.
- Customer data stays safe and separated to protect privacy.

Benefits

With the AI voice agents, there's improvement in both customer experience and operational efficiency:

- Support teams spend less time answering routine questions because the agent handles case status checks and updates.
- Customers don't need training or knowledge of internal processes—The agent guides them.
- Customer satisfaction increases because the service is faster, easier, and more intuitive.

CSM AI voice agents

There are two AI voice agents for CSM. Each agent is associated with a voice service acting as a virtual customer service agent and can be configured with welcome messages, voice profiles, and fallback options like human agent routing or case creation. This setup enables efficient, AI-driven support for customers.

Customer Service Management AI voice agents

AI voice agent	Description
Case status	Provides users with comprehensive status updates for cases based on the case number. Designed for users who need quick and reliable access to case details, including state, creation date, assigned agent, latest update, and a summary of the case.
Create case	Lets customers log cases using voice input by guiding them through a clear, step#by#step conversation that captures and validates required details. It creates the case, and confirms successful submission.
Update case	Updates existing cases using voice input. A structured voice conversation guides agents through identifying the case, collecting fields, validating changes, and confirming updates. This reduces manual effort and keeps agents focused on the customer.

AI voice agents are managed through AI Agent Studio. To configure a new agent:

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**, then select the AI agents tab.
2. Open the **Add** drop-down list.
3. Select an AI voice agent to create a voice-enabled agent for case management.

This interface enables admins to create a AI voice agents, connect to supported contact center providers, and deploy fully functional AI voice agents for case management. For deployment and configuration info, see Deploy AI voice agents.

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Note:

- To enable customer access and use of AI voice agents, an admin must install the plugin Customer Service Management AI agent collection
- To modify the AI voice agents, duplicate it, and adjust the settings according to your requirements. For more info see, Configure and customize the AI Voice Agent for ServiceNow Otto for CSM.

Important:

- When you modify an AI agent, or a tool, make sure that you update all instructions accordingly.
- In the Define availability screen for the AI agent, make sure that the **Status** field is enabled to activate the AI agent.

Configure and customize the AI Voice Agent for ServiceNow Otto for CSM

Configure the AI Voice Agent to let callers check case status, create cases, and update existing cases through voice interactions.

Before you begin

Verify the following prerequisites are in place before you begin:

- ServiceNow Otto for CSM is activated on your instance.
- A supported CCaaS integration is configured. Supported providers are Genesys, Twilio, NICE, Five9, 3CLogic, and Amazon Connect.
- The platform-level AI Voice Agent plugin is auto-installed. No separate installation is required.
- Your instance is on Zurich Patch 4 or Yokohama Patch 11 at minimum.

The AI Voice Agent for ServiceNow Otto for CSM includes the following default agents:

- Case Status AI Voice Agent — retrieves live case state, priority, assigned group, product, and latest work notes.
- Create Case AI Voice Agent — collects issue description and creates a new CSM case in real time.
- Update Case AI Voice Agent — updates an existing case after identifying the case, collecting the fields to update, and validating the changes.

Note: The default agents are starting points and must be cloned and grounded with your organization's specific instructions before deploying to production.

Role required: admin

Procedure

1. Configure the Voice Assistant in Assistant Designer.
   The Voice Assistant connects your telephony channel to the AI Platform.

   a. Navigate to **Conversational Interfaces** > **Assistant Designer** to create a voice agent.

   b. Select your CCaaS provider and enter the integration credentials from your CCaaS account.

   c. Under **Security Settings**, define your authentication method.

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Use PIN (SoftPin) for B2C deployments it validates the caller's PIN against the User table on the AI Platform via the phone keypad. The caller enters their PIN via the phone keypad, which is validated against the User table on the AI Platform. Alternative methods include SMS Code, Knowledge Factors, OTP, and Okta Push Notification.

d. Set the voice assistant name, greeting language, and voice personality.
Supported languages include English, German, Spanish, French, French Canadian, Brazilian Portuguese, Dutch, Italian, Korean, and Mandarin.

2. Optional: Duplicate and ground the default CSM Voice Agent in AI Agent Studio.

a. Navigate to **AI Agent Studio** > **Create and Manage** > **AI Agent** and locate the agents under the CSM Voice Agent collection.

b. Select the three-dot menu for each agent and select **Duplicate**.
Cloning creates a copy you can configure without modifying the default baseline.

c. Ground the cloned agent by updating the agent instructions, record operation tools, and any business-specific context.
Update the following:

- Agent instructions to reflect your company's policies, terminology, and expected caller interactions.
- Record operation tools scoped to the correct tables and fields relevant to your case data.
- Business-specific context the LLM needs to generate accurate, on-brand responses.

d. Add tools to the cloned agent as needed.
Available tools include:

- RAG Search tool — retrieves relevant knowledge articles during the call. Scope this to two to three knowledge bases most relevant to your voice channel to maintain low response latency.
- Subflows or script tools — trigger additional workflows on case creation or update.
- MCP Server tool — connects to external agentic systems if needed.

3. Map the cloned Voice Agent to the Voice Assistant.

a. Return to Assistant Designer and add the duplicated agent to your Voice Assistant configuration.

b. Configure fallback behavior for scenarios where the AI does not return a result or a call exceeds the 10-minute limit.
Available fallback options:

- Transfer to live agent — the caller is transferred with a transcript summary and detected intent pre-populated in the agent workspace.
- Generate a case via Record Producer — automatically creates the appropriate record type such as a case type, if no live agents are available.

4. Test the Voice Agent using a live call to the configured phone number.
Use the following resources to validate and review call outcomes in AI Agent Studio:

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- Interactions table — full transcript logged per call as soon as the call ends.
- Execution Plans table — step-by-step tool invocation log for debugging unexpected agent behavior.
- Analytics dashboard — accessible from the Analytics tab in Assistant Designer. Tracks total voice conversations, deflection rates, conversation outcomes, and satisfaction scores.

Result

The AI Voice Agent is configured and ready to handle customer voice interactions for case status inquiries, case creation, and case updates. Customers can check open case statuses, submit case updates, and create cases through guided voice interactions without requiring a live agent.

What to do next

Monitor the Analytics dashboard weekly during early production to review deflection rates, conversation outcomes, and CSAT scores. Review Execution Plans regularly to tune agent instructions based on tool invocation patterns.

Components installed with voice

Information about the roles, tables, and scheduled jobs that are installed with Voice Agents.

AI voice agent roles

The following table lists the roles installed with the Voice for ServiceNow Otto plugin.

Role	Description
`sn_voice_aia.admin`	Provides access to agents configuration flow.
`sn_voice_aia.guest`	Enables employees to use AI voice agents without authentication.
`sn_voice_aia.integration`	Enables access to integrations such as Genesys.

AI voice agent attributes

The AI voice agent attributes enable you to configure the authentication functionality for AI voice agents. Navigate to **All** > **System Definition** > **Tables** and search for the **Now Assist Deployment Config Attributes** table to view the attributes.

The following table lists the attributes related to AI voice agent configuration.

Attribute	Description
`voice_max_retries`	The maximum number of retries allowed for successful authentication before the user account is locked. The default value is `3`.
`voice_minutes_account_locked`	The number of minutes the user account is locked for, following maximum retries. The default value is `1440` minutes.

AI voice agent system properties

The following table consists of system properties to set up AI voice agents.

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Property	Description
`sn_aia.enable_voice_agents`	This system property to enable AI voice agents. Set the value of the property to `true` to enable AI voice agents on the instance.

Customer Service Management Live interaction recommendations AI agent for voice channel

Live interaction recommendations AI agent is an agentic capability within ServiceNow Otto® Customer Service Management (CSM) that provides real-time recommendations to human agents during live customer interactions on the voice channel. When a customer contacts a support agent, this AI agent analyzes the ongoing conversation transcript, retrieves relevant knowledge and customer context, and surfaces actionable recommendations directly within the CSM Configurable workspace.

Important: Starting with v7.0 of Customer Service Management AI agent collection, the Live Agent Assist AI agent has been renamed to Live Interaction Recommendations AI agent. Some of its entities have also been renamed. For a list of old and new names, see Renamed entities in Live Agent Assist.

Live interaction recommendations AI agent reduces handle time, improves first-contact resolution, and helps agents deliver consistent, accurate responses throughout the live voice interaction.

How Live interaction recommendations AI agent works

Live interaction recommendations AI agent consists of two tools:

Get Interaction Context (Script and autonomous)

This tool retrieves contextual information about the current voice interaction. It is configured as a pre-run tool, so it executes automatically when a Live interaction recommendations AI agent is initialized. It gathers baseline customer and interaction details, such as account, install base, sold products, and previous cases or interactions, before any recommendation is generated. Because it is autonomous, it requires no manual action from the agent; it fetches this context proactively so that the Analyze Interaction & Generate Response tool has the customer data it needs to process the customer query.

Analyse Interaction and Generate Recommendation (Subflow and autonomous)

The tool is a subflow-based tool that internally invokes skills to analyze the transcript, generate Knowledge Graph queries and generate relevant responses. These skills work in sequence to process the conversation, retrieve information from multiple data sources, and generate a final recommendation with cited sources.

Live interaction recommendations AI agent is triggered when the customer call lands to a human agent in the CSM Configurable workspace and a voice interaction record is created. It activates when a live CSM agent begins handling a customer interaction over a voice call. No manual initiation is required. Once triggered, Live interaction recommendations AI agent fetches basic customer information like account, install base, sold product details, previous cases, previous interactions. When the **Get Recommendations** button is selected, the Live interaction recommendations AI agent performs the following tasks:

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1. Transcript Analysis: continuously reads and processes the live conversation transcript to extract unanswered customer queries.

   Based on the customer query:

   - Queries the Knowledge Graph if additional customer details are required.
   - Searches knowledge articles if recommendations need to be generated from a KB article.

   For more information on the data sources, see Data sources.
2. Recommendation Generation: synthesizes results for the customer query from the customer context, KB article, and Knowledge Graph to generate actionable, cited recommendations for the agent.
3. Clarification Query Handling: manages scenarios where the transcript is ambiguous, presenting clarifying questions to the agent.
4. Follow-up Query Handling: addresses agent follow-up questions in the context of the ongoing voice interaction.

The following table shows the skills and their responsibility in the Live interaction recommendations AI agent:

Live interaction recommendations AI agent skills

Skill	Responsibility
Live Interaction Transcript Analyser	Analyzes the live transcript to extract unanswered customer queries and evaluate resolution paths.
Live Interaction Graph Query Generator	Generates Knowledge Graph queries to retrieve joined data across CSM entity types.
Live Interaction Response Generator	Synthesizes KB articles, customer info, and KG results into a final recommendation with source citations.
Live Interaction Query Enhancer	Enriches agent follow-up queries with customer context and transcript history before re-initiating the recommendation pipeline.

Data sources

Live interaction recommendations AI agent retrieves information from the following primary data sources:

Customer Context Builder

The Customer Context Builder is an interface class that pre-fetches basic customer context directly from database tables. This direct query path provides faster access to high-priority fields such as recent interactions and installed products for the current caller.

The base system includes the `CustomerContextBuilder` interface with a `CustomerContextBuilderImpl` implementation. This implementation fetches and aggregates customer context data from multiple ServiceNow tables, including interactions, cases, contracts, assets, and entitlements. All data is anchored to an interaction record and serialized into a pipe-delimited format suitable for LLM input.

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> **Note:** The Customer Context Builder is a scripted customization. Extending it requires creating a custom implementation of the interface class. For most scenarios, adding tables to the Enterprise Knowledge Graph tag is an easier approach because it does not require scripting.

AI Search Profile

A Retrieval-Augmented Generation (RAG) retrieval call queries the AI search profile to identify configured sources. In the base system, the Live interaction recommendations AI agent Search Profile is scoped to the Knowledge (kb_knowledge) table, so recommendations draw from knowledge articles. Source citations identifying the contributing articles appear at the bottom of each recommendation. Admins can extend the profile to include additional tables. For more information on how to add additional search sources, see Create a search source for AI Search.

Enterprise Knowledge Graph

The Enterprise Knowledge Graph retrieves customer-specific information such as contract details, recent cases, and asset data. A tag scopes queries to a defined set of tables so that retrieval stays targeted.

In the base system, the tag covers the Account, Asset, Case, Consumer, Contact Contract, Entitlement, Install Base Item, Installed Product, Interaction, Product Model, and Sold Product tables. As an admin, you can edit the tag to include additional tables:

1. Navigate to **All** > **Knowledge Graph** > **Knowledge Graph Designer** > **Enterprise Graph**.
2. From the **Enterprise Graph Tags**, select the **CSM Live interaction recommendations AI agent Tag**.
3. In the **Selected Tables** section, add the desired tables.

For more information on editing tags, see Managing Knowledge Graph tags.

Role masking

Required role: B2B agents (sn_customerservice_agent) and B2C agents (sn_customerservice.consumer_agent)

> **Important:** To access data in the agentic workflow, the admin role must include the specified roles under **Contains roles**.

Agentic workflows and their AI agents use role masking to determine which users can access them. Ones installed with your 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.

In the data access settings, you must also add the necessary roles to enable agents to resolve cases efficiently. For example, add the csm role to the agentic workflow's list of approved roles to enable access to case records.

Configure Live interaction recommendations AI agent for voice channel

Configure the Live interaction recommendations AI agent to generate recommendations for ongoing voice interactions in the CSM Configurable workspace.

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Before you begin:

- The Customer Service Management AI Agent Collection plugin must be activated on your instance.
- Role required: now_assist_admin

1. Navigate to **All** > **AI Agent Studio** > **Create and manage**.
2. Select **Live interaction recommendations AI agent** in the AI agents tab.
3. Activate the trigger.
   - In the Add triggers section, select the **Live interaction recommendations AI agent - Interaction** trigger which is in inactive state by default.
   - In the Edit trigger dialog, turn on the **Trigger is ON** radio button and select **Save**.

   For more information on modifying an AI agent, see Modify an AI agent.

Access Control lists (ACLs)

ACLs (Access Control Lists) are preconfigured to support the AI agents and their associated flows and actions. By default, ACLs are configured for the sn_esm_agent role. Customers can modify these ACLs to align with their specific business requirements and security policies. For more information, Configure security controls for a skill.

When updating the agent role for the Live interaction recommendations AI agent, it is important to also update the corresponding ACLs to ensure proper permissions. To manually update ACLs for custom roles:

1. Go to the **sys_security_acl** table.
2. Use filters to locate ACLs related to your use case, AI agent, and internal flows or actions.
3. Add your custom role to each relevant ACL record.

Use the Live interaction recommendations AI agent for voice channel

Get real-time recommendations from the conversations happening over a live voice interaction.

Before you begin:

- ServiceNow and CCaaS provider integration must exist.
- Real-time transcription feature with CCaaS provider must be enabled.
- The Live interaction recommendations AI agent - Interaction trigger in the Live interaction recommendations AI agent must be activated. For more information, see AI agents, skills, and agentic workflows on by default.
- Role required: sn_customerservice.consumer_agent

Procedure:

1. When a customer calls the support channel, an interaction record is created and assigned to a human agent. Select the ServiceNow Otto icon.

   The Otto panel appears with the interaction ID.

2. After you gather details about customer requirements, select the **Get Recommendations** button on the ServiceNow Otto panel.

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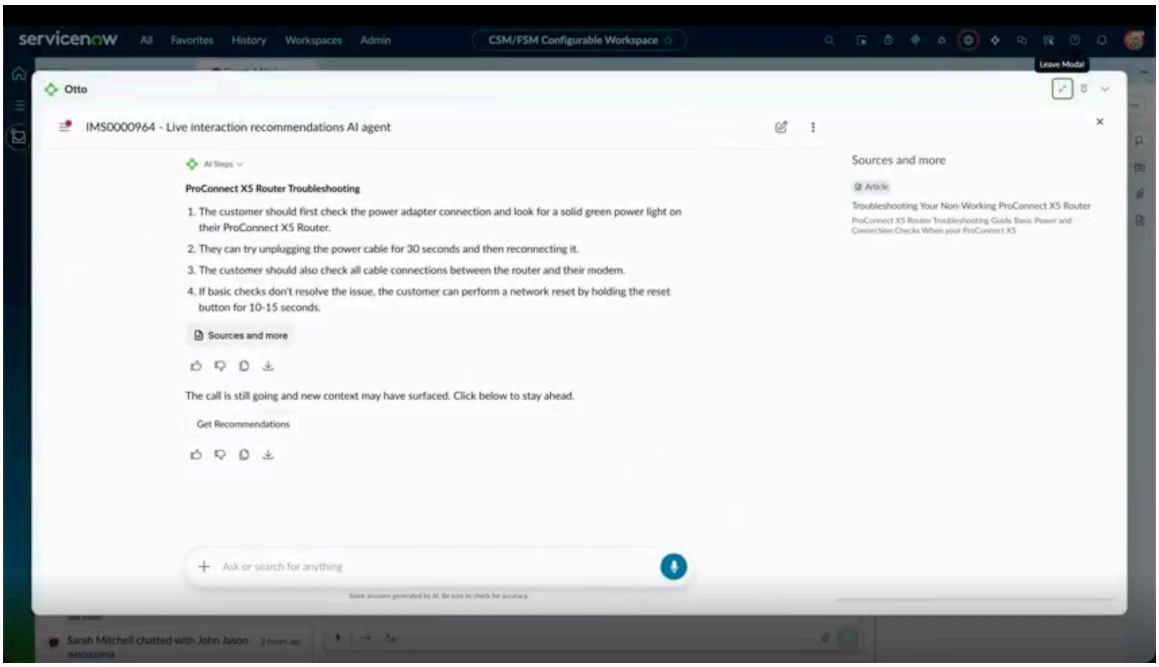
- The AI agent analyzes the conversation and generates recommendations or asks more questions. The processing icon appears while the agent processes the conversation before generating the next steps. If the customer asks multiple queries, you will be asked to choose the query you want to address first. You can pick a query and address one after another based on the customer's priority. For more information on how the recommendations are generated from the sources, see Live interaction recommendations AI agent overview.
- When the recommendations are generated for a query, the sources from which the recommendations are generated appear under the **Sources and more** section. When you select the **Sources and more** button, the ServiceNow Otto panel expands where you can continue your conversation with the AI agent and view the list of sources simultaneously. You can open these sources for further details.



3. As you progress through the conversation, select the **Get Recommendations** button to get the recommendations.
4. Clarification handling: If the AI Agent needs additional context before generating a recommendation, it displays clarifying questions with rendered option buttons, then waits for user selection.

   When you select one of the option buttons, the final answer is displayed with cited sources and the **Get Recommendations** button for further queries.
5. Follow-up query handling: After an initial recommendation is delivered, type any follow-up question in the text field and select the Enter icon to get the recommendations.

   You can ask natural language questions, such as `What products is this customer currently using?` The AI agent responds with accurate, contextually relevant answers and maintains conversational context across multiple questions.

The final response is rendered with cited sources and the **Get Recommendations** button.

Renamed entities in Live Agent Assist

Starting with version 7.0 of Customer Service Management AI agent collection, several configuration records that support the Live Agent Assist capability were renamed to align with its new label, Live interaction recommendations AI agent.

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The following table shows the labels used before v7.0 of Customer Service Management AI agent collection and the labels used starting with v70.

Renamed entities

Entity type	Before 7.0	Starting with v7.0
AI Search Profile	Live Agent Assist Search Profile	Live interaction recommendations AI agent Search Profile
Skill	Live Agent Assist Graph Query Generator	Live Interaction Graph Query Generator
Skill	Live Agent Assist Query Enhancer	Live Interaction Query Enhancer
Skill	Live Agent Assist Transcript Analyser	Live Interaction Transcript Analyser
Skill	Live Agent Assist Response Generator	Live Interaction Response Generator
AI Agent	Live Agent Assist	Live interaction recommendations AI agent
AI Agent Trigger	Live Agent Assist - Interaction	Live interaction recommendations AI agent - Interaction
Tag	Live Agent Assist Tag	CSM Live interaction recommendations AI agent Tag

Communities

With the ServiceNow® Communities application, connect, engage, and collaborate with your employees, customers, partners, and prospects. Your users get quick responses to their issues by posting questions, reviewing blogs or videos, and searching for previous discussions. It is an essential component of your self-service strategy along with Knowledge Base and Service Catalog.

Communities

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Explore **Set up** **Administer**

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Communities

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(continued)

- Communities roles
- Community content types
- Configure community forums
- Forum and user permissions management
- Community subscriptions
- Gamification
- Domain separation and Communities
- Activate Communities plugins
- Properties installed with Communities
- Community setup guide for admins
- Create a forum
- Create a forum user
- Create a forum permission
- Invite users to become members of a forum
- Configure the community profile
- Enable users to self-register to a community
- Enable knowledge harvesting
- View the Communities performance dashboard
- Configure announcement for community members
- Moderate a community
- Administer gamification

Use

- Community homepage features for logged in users
- Request membership to a forum
- Search the community
- Subscribe to content
- Ask a question in the community
- Post a blog in the community
- Post a video in the community
- Post a document in the community

Develop

- Developer training
- Developer documentation

Troubleshoot and get help

- Search the Known Error Portal for known error articles
- Contact Customer Service and Support
- Ask or answer questions in the ServiceNow Community.

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Communities

> **Important:**
>
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(continued)

- Post a community event
- Bookmark community content
- Provide feedback on community content
- Report inappropriate community content
- Manage your community profile
- Follow a community user
- Harvest knowledge from a community
- View a list of questions and create a case
- Moderate gamification

Exploring Communities

Explore foundational concepts for Communities. For setup tasks, see Configuring communities. For end-user guidance, see Using communities.

> **Important:**
>
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Domain separation and Communities

Domain separation is unsupported in Communities. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

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Important:

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Support level: No support

- The domain field may exist on data tables but there is no business logic to manage the data.
- This level is not considered domain-separated.

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

Related topics

Domain separation for service providers

Configuring communities

Configure various aspects of Communities based on the specific requirements of your organization.

Important:

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Community content types

There are seven supported content types: Answer, Blog, Comment, Document, Event, Question, and Video.

Important:

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Community administrators and forum administrators can configure content types at the community and forum levels.

User access to content is based on the permissions that users have. Community users can add content to the different content types and provide feedback on the content.

Content types

Content type	Description
Question	Post a question about an issue or a challenge and get answers from other users. You can submit your question on the Community homepage and choose a forum or a topic to post it in. A question can be tagged to more than one topic.

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Content types (continued)

Content type	Description
Answer	Reply to a user question or another answer with a possible solution or statement.
Blog	Post a blog on a topic of interest to share with other users. You can include images and videos.
Comment	Enter a comment to express an opinion or to react to a video or a blog.
Video	Upload a video on a topic of interest for other users. Videos appear as web URLs that link to the most popular video sites. Communities supports playback from: • YouTube – youtube.com • Vimeo – vimeo.com • DailyMotion – dailymotion.com • Facebook – facebook.com **Note:** Videos can be included in other types of content, including questions, answers, blogs, and comments.
Document	Post a document to share with other community members. You can post your document from within a forum, choose a topic to post it in, and tag it to more than one topic.
Event	Create an event that other community users can register for and attend.

Configure blog publish schedule

Configure the publishing interval to ensure blogs are published closer to the scheduled time.

Before you begin

Role required: system_scheduler_admin

Note: `system_scheduler_admin` is a high#privilege role which grants broader permissions. Assign this role only after reviewing the permissions and confirming necessity.

Important:

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About this task

The default interval for publishing blogs is 30 minutes. You can configure a shorter time so that the blog is published approximately around the scheduled time.

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Procedure

1. Navigate to **All** > **System definition** > **Scheduled Jobs**.
2. Search and select `Publish scheduled content` in the name column.
3. Set the required time in the **Repeat interval** field.
   Keep the time short (for example, 5 minutes) to reduce the delay in publishing blogs from the scheduled time.
4. Click **Update**.

Community feedback types

There are two supported feedback types: Upvote and Helpful.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Community users can provide feedback on the content they have access to in the community.

Feedback types

Feedback type	Description
Helpful	Helpful feedback is associated to the following content types when a community users marks content as helpful: Blog, Video, Documents, Answer, Comment.
Upvote	Upvote feedback is associated to the Question content type when a community user marks a question as helpful.

Community access types

Access types are used to control access to a forum or a content type.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

You can define the access types for a forum and a content type in a permission. There are four access types available by default.

Access types

Access type	Description
Forum Admin	Applies to forums.
Forum Moderator	Applies to forums.
Content Read	Applies to all content types.

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Access types (continued)

Access type	Description
Content Write	Applies to all content types. Content Read access is automatically included in Content Write.

Note: It is not recommended that you create your own access types. Advanced knowledge of Communities architecture and scripting code to support and interpret the new access type is required.

Contact Customer Service and Support for further information.

To see all available access types, navigate to **Community** > **Administration** > **Access Types**.

Platform Analytics Solutions for Communities

This Platform Analytics Solution contains preconfigured dashboards. These dashboards contain actionable data visualizations that help you improve your business processes and practices.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Use the Performance Analytics widgets on the dashboard to visualize data over time, analyze your business processes, and identify areas of improvement. With solutions, you can get value from Performance Analytics for your application with minimal setup.

Note: Solutions include some dashboards that are inactive by default. You can activate these dashboards to make them visible to end users according to your business needs.

For unlimited access to all features of this Platform Analytics Solution, purchase a Performance Analytics subscription. For more information, see Activating your Performance Analytics subscription.

To enable the solution for Communities, an admin navigates to **System Definitions** > **Plugins** and activates the Performance Analytics - Content Pack - Communities plugin.

Related topics

Activate your Performance Analytics subscription

View the Communities performance dashboard

The Communities dashboard displays up-to-date status on community usage, membership, content type and activity, and trends by forum and by topic.

Before you begin
Role required: pa_admin

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Important:

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Procedure

1. Navigate to **All** > **Performance Analytics** > **Dashboards**.
2. In the list, select **Community** > **Communities Dashboard**.
   On dashboard tabs:
   - Content types are question, answer, comment, blog, video, or document.
   - "Social activity" is any response (answer, comment, blog, video, or document) to a topic that is added by a user other than the originator.
   - Content score data is for content created during the last 30 days.
   - Click a scorecard to view detailed data or a trend chart.

Tabs shown in the Performance dashboard

Overview tab	Scorecards In each scorecard, the percentage change in the current period appears under the total over the lifetime of the community. ○ Number of current members and total number of questions. ○ Percentage of questions that have been marked as **Solved** by the user who asked the question. ○ Percentage of questions that have not been answered. ○ Total number of attachments (blogs, videos, and documents). Charts ○ **Community Activity**: new community members and total sessions for the month. ○ **New content** of any type. ○ **Top 3 Forums and Topics by Social Activity**: Topics and forums that have received responses from other members. Hold the cursor over an area to view the count of activity.
Content Analytics tab	For any chart, you can focus on the most popular content types, forums, or topics by selecting a **Breakdown**. ○ **New content** and count of active members who contributed content for the most recent months for the selected breakdown. ○ The top 10 items with the highest number of views for the selected breakdown.

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Forum Analytics tab	○ Heat maps display data for **Content** (total current content volume), **Views** (total unique user views), and **Social Activity**. Forums are listed on the vertical axis and content types appear on the horizontal axis. ○ **Additional KPIs**: key performance indicator data for forums.
Topic Analytics tab	○ Heat maps display data for **Content** (total current content volume), **Views** (total unique user views), and **Social Activity**. Topics are listed on the vertical axis and content types appear on the horizontal axis. ○ **Additional KPIs**: key performance indicator data for topics.
Admin Analytics tab	Heat maps display data for **Number of Posts Moved** and **Featured Content**.

Related topics

Performance Analytics scorecards

Performance Analytics widgets

Communities dashboard

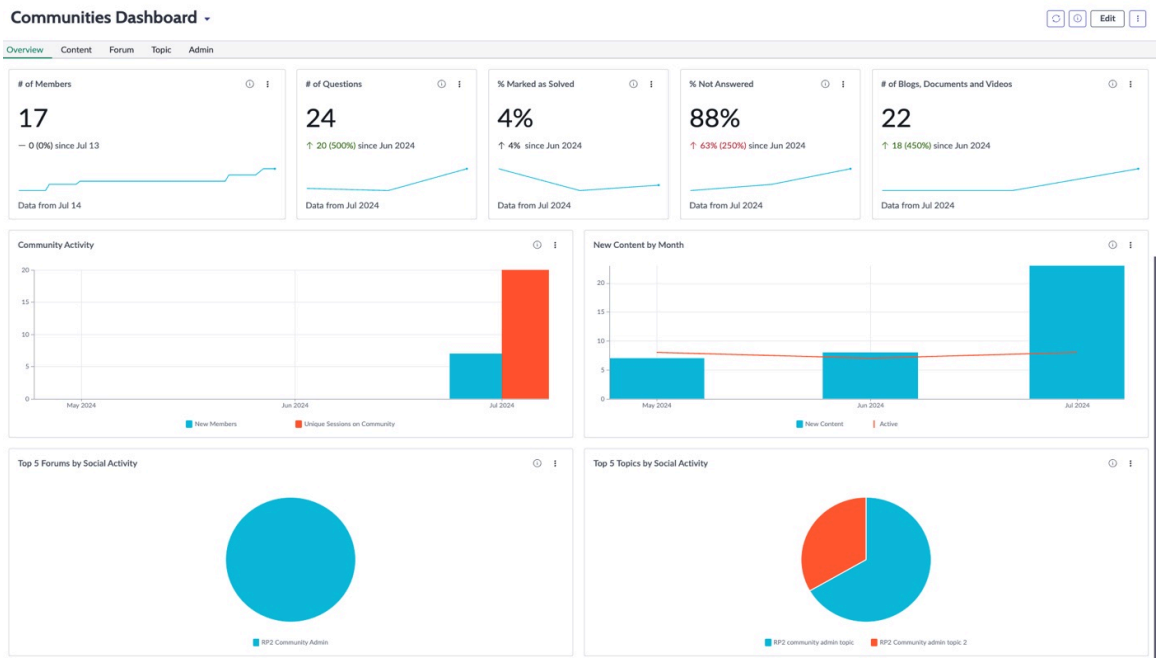
The Communities dashboard displays up-to-date status on community usage, membership, content type and activity, and trends by forum, topic, and admin.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Access the dashboard by navigating to **All** > **Platform Analytics** > **Dashboards**. On the dashboard page, search Communities Dashboard.

Overview tab



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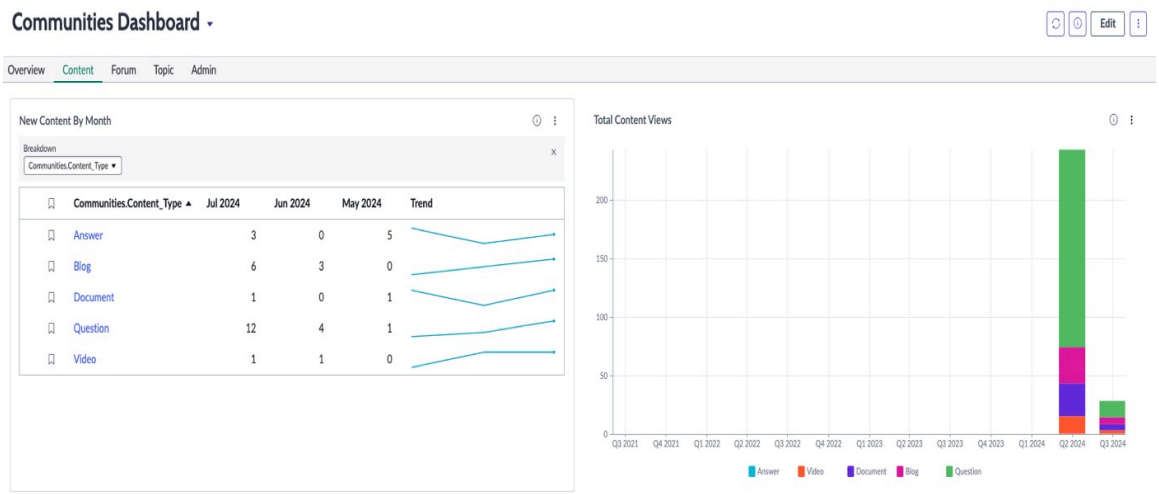
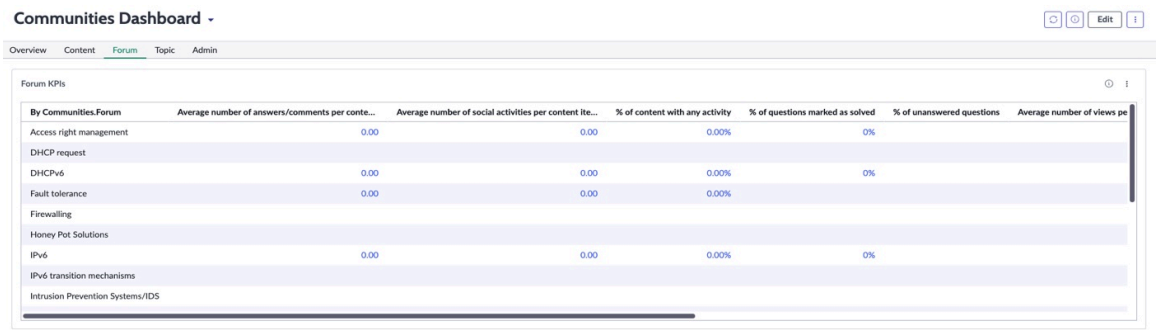
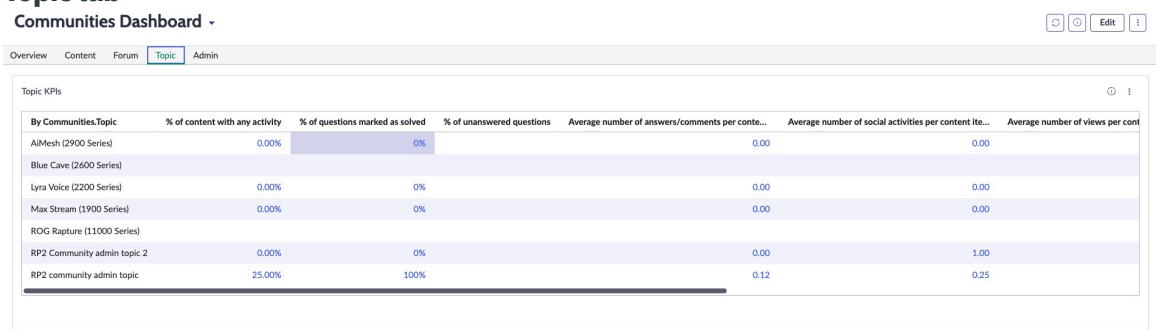
Content tab



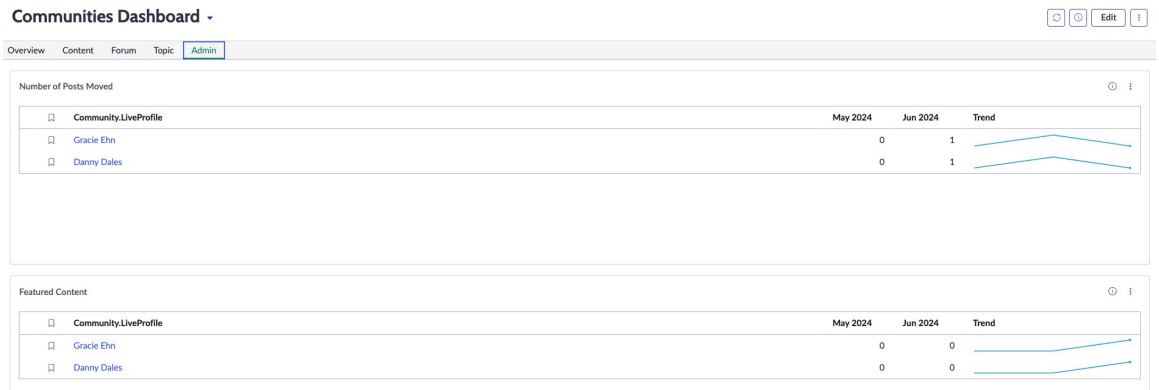
Forum tab



Topic tab



Admin tab



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End user and roles

End user	Required role
Community moderator	sn_communities.community_moderator
Moderation administrator	sn_communities.moderation_admin
Community administrator	sn_communities.admin
Forum administrator	sn_communities.forum_admin
Forum moderator	sn_communities.forum_moderator
Content creator	pa_viewer, pa_admin

Indicators

The Communities dashboard presents the following key performance indicators:

# of members

Total number of members.

# of Questions

Number of questions created in the last 30 days.

% Marked as Solved

Number of questions created in the last 30 days, which are marked as solved.

% Not Answered

Number of questions created in the last 30 days, which were not answered.

# of Blogs, Documents, and Video

Number of blogs, documents, and videos created in the last 30 days.

Non-question content

Number of blogs, videos, and documents posted.

% With activity

Percentage of primary or secondary community content with at least one response or feedback.

Avg. # of social activities per content

Average number of activities (mark as helpful, upvote, comments, and replies) on any active primary or secondary community content.

# of contributors

Number of contributors.

New content this month

Number of new content posts in the last 30 days.

Avg. # of views per content

Average number of views of the content.

Avg. # of comments per content

Average number of comments of the content.

# of featured content

Number of content posts that have been featured.

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# of Content moved from activities

Number of content posts moved from activities.

# of Content moved to activities

Number of content posts moved to activities.

Breakdowns

The following breakdowns apply to the indicators on the dashboard:

- Communities Content Type
- Communities Forum
- Communities Topic

Data visualizations

The dashboards include the following visualizations:

Title	Type	Description
Community Activity	Column	View the number of new community members and total of sessions on the community per month.
New Content by Month	Column	View the number of new content posts per month.
Top 3 Forums by Social Activity	Pie	View forums that have received responses from other members. Social activity is any response (answer, comment, blog, video, or document) to a topic added by a user other than the user that originally posted the content.
Top 3 Topics by Social Activity	Pie	View topics that have received responses from other members.
New Content by Month	Single Score	View the amount of new content, forums, or topics created per month. For any chart, you can focus on the most popular content types, forums, or topics by selecting a **Breakdown**.
Total Content Views	Column	View the number of views for each content type per month.
Forum KPIs	Single Score	View different indicators for the forums.
Topic KPIs	Single Score	View different indicators for the topics.

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Title	Type	Description
Number of Contents Moved	Single Score	View the number of content posts that have been moved by community administrators and community moderators per month.
Featured Content	Single Score	View the number of posts featured by different users per month.

Migrate Social Q&A data to Communities

If you want to migrate existing Social Q&A content to Communities, you can use a script to migrate the data.

Before you begin

Role required: script_fix_Admin
The Customer Communities plugin (com.sn_customer_communities) must be activated.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **System Definition** > **Fix Scripts**.
2. Search for the script `Migrate Social QA to Community` and open it.
3. To enable the script, select the **Active** check box and click **Update**.
   The script is deactivated by default.
4. Click **Run Fix Script**.
   The **Run Fix Script** popup appears.
5. Click **Proceed in Background**.
   Always use this option for long-running scripts, or if you do not know the expected execution time.
6. Check the status of the fix script and review the results from the Show Progress Workers related list.

What to do next

Verify the following information.

- A new forum is created for every knowledge base that has Social Q&A content.
- All questions, answers, comments, helpful votes, and upvotes are migrated.
- All view counts, answer counts, and comment counts are migrated.
- The accepted solution to a question in Social Q&A is **Marked as Correct Answer** in Communities.
- Social Q&A is deactivated for every knowledge base that contained Social Q&A data. Social Q&A content is no longer visible for these knowledge bases.

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View community logs

Community logs display information about who has viewed or searched for content in a community. The list view displays all log entries, unless filtered.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Search Logs** or **View Logs**.
2. View the logs.

Community logs

Log	Description
Search Log	View who has searched for what and where in the community.
View Log	View who has viewed what and where in the community.

View community feedback and bookmarks tables

View feedback and bookmarks tables to view which community content was given feedback or was bookmarked.

Before you begin

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.moderation_admin, sn_communities.forum_admin, or sn_communities.forum_moderator

Note: Communities users (sn_communities.community_user) have read access to the bookmarks table and the feedback table. Users can only view another user's bookmark and feedback records for content they themselves can access. Bookmark and feedback record visibility is constrained by the viewer's access to the underlying content.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Feedback**.
2. Choose one of the following options.
   - Click **Feedback** to view the content feedback was given for, the type of the feedback, and who provided it.
   - Click **Bookmarks** to view the content that was bookmarked and who added it.

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Create a case from a discussion

In order to engage your internal experts to reply to discussion threads, you can create cases directly from community questions.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Creating cases from community questions requires activation of the Case Management Core (com.sn_customerservice) plugin.

This feature is available for questions that have been posted by community users who are also contacts or consumers in the Customer Service Management application. Questions can be either answered or unanswered.

Note: Cases can be created only from questions.

Two sets of users can create cases from questions:

- Customer service agents, consumer service agents, and customer service managers.
- Users with the sn_customerservice.proxy_case_creator role. Community administrators and community moderators inherit this role.

Administer create case from discussion

Configure parameters for the case generated from the community discussion so that it can be routed accordingly.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Creating a case from a discussion requires a configuration that maps information from the question in the community to fields on the Case form. The **Create Case** configuration is included with the feature. This configuration defines the source and destination tables and maps source fields to destination fields. This configuration is stored in the CSM Table Map table [csm_table_map]. The system administrator can modify this configuration as needed.

The **Create Case** configuration uses the Social Q&A Question table [kb_social_qa_question] as the source table and the Case table [sn_customerservice_case] as the destination table. It includes the following mapping information.

Mapping information configuration form

Question information	Case information
Question	Short description
Question author	Contact or consumer
Question author's account	Account
Opened by	Logged in community user

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Mapping information configuration form (continued)

Question information	Case information
Priority	Low (priority = 4)
Channel	Community

To create additional mapping between these tables, add the additional fields to the **Create Case** configuration in the CSM Table Map table. Include these fields as needed on the **Create case from question** record producer.

Enable knowledge harvesting

Configure knowledge harvesting from a community to convert unstructured conversations to structured knowledge articles and make the information more accessible.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Community administrators perform the following tasks to configure knowledge harvesting.

- Enable the Knowledge Management Service Portal plugin (com.snc.knowledge_serviceportal).
- Add a knowledge base to a forum to store the knowledge article in a specific knowledge base.

  Note: You can only add one knowledge base to a forum. The same knowledge base can be used for multiple forums.

- Add a knowledge category to a forum topic to categorize the harvested content.

Activate Communities plugins

Activate the Customer Communities plugin to use the Communities application.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Communities is available for customers who are:

- Licensed for the Customer Service Management application.
- Licensed for HR Service Delivery.

To activate Communities, activate the Customer Communities plugin (com.sn_customer_communities). This plugin is not active by default.

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When you activate the Customer Communities plugin, the following plugins automatically activate:

- External User Registration plugin (com.sn_external_user_register)
- Communities plugin (com.sn_communities)
- Gamification plugin (com.snc.gamification)
- Subscriptions and Activity Feed Framework plugin (com.snc.activity_subscriptions)

To activate Communities demo data, activate the Communities Demo Data plugin (com.sn_communities_demo).

To activate the Communities dashboard, activate the Performance Analytics — Content Pack — Communities plugin (com.snc.pa.communities).

Procedure

1. Navigate to **All** > **System Definition** > **Plugins**.
2. Search for the plugin com.sn_communities.
3. Click **Install**.
4. Click **Activate** on the Activate Plugin pop-up window.

Community setup guide for admins

Define your requirements with community and forum stakeholders and set up your forums for community users to start creating content.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Requirements

The roles required to define requirements and set up forums include sn_communities.admin or sn_communities.forum_admin.

Before you begin

Meet with the stakeholders

Stakeholder and responsibility

Stakeholder	Responsibilities
Forum administrators	Define and oversee the forum processes for day-to-day operations related to topic creation, user management, and moderation.
Community administrators	Configure advanced settings for Communities features.

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Stakeholder and responsibility (continued)

Stakeholder	Responsibilities
Community users	Contribute content in the form of questions, answers, blogs, and comments.

With stakeholders, determine your community requirements

- Who are the consumers of the community content?
- Which content types can users contribute?
- Who can contribute content and who should have read-only access?
- What should the names of the initial forums be?
- Within these forums, what should the names of the initial topics be?
- Which keywords should be banned?
- How should the system moderate content and users?
- What should the default notifications that users receive for various community activities be?

What to do

Use the following steps as guidance to setting up your community.

1. **Create a forum user**: Create a forum user to use to define memberships to a forum.
2. **Create a permission**: Create a permission to use to define a user's access to a forum and its content types.
3. **Add access and content types to your permission**: Add access types to a permission to determine the access that users have to certain forums and content.
4. **Create a forum**: Create a forum to provide a place for users to share content and configure the forum to allow registered users to request access to join.
5. **Configure content types for a forum**: Configure content types for a forum to define which types of content to use in a particular forum.
6. **Create a forum permission**: Create a forum permission by adding a forum user and a permission to a forum.

If required, perform the following actions:

Invite users to join the forum

Invite users to become members of a forum to encourage greater community involvement.

Create permission exceptions

Create a permission exception for users who require specific permissions for a forum.

Copy permissions

- Copy permissions from a forum to copy all permissions and content types from one forum to another.
- Copy permissions from a parent forum.

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Debug user permissions

Debug user permissions to investigate and diagnose problems with user access to forums.

Next steps

Create a topic for users to create and share content.

Add a topic to a forum so that users can associate content to that topic.

Moderate a community to set up how the system moderates content and users.

Using guided setup to implement Communities

Communities guided setup provides a sequence of tasks that help you configure Communities on your ServiceNow instance. To open Communities guided setup, navigate to **Community** > **Administration** > **Guided Setup**.

For more information about using the guided setup interface, see Using guided setup.

Configure community content types

Configure content types, such as videos and blogs, for the community.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

You can configure content types at both the community and forum level. At the community level, content types are active by default. Based on your requirements, you can deactivate content types.

Procedure

1. To configure content types at the community level, navigate to **Community** > **Administration** > **Content Types**.
2. Click a content type.
3. To deactivate a content type, clear the Active check box.
4. Click **Update**.
   The content type is no longer visible to the community.
5. To configure content types at the forum level, navigate to **Community** > **Administration** > **Forums**.
6. Click a forum.
7. Click the **Content Types** related list.
8. In the Active column, double-click a row.
9. To activate a content type, select **True**.
10. To deactivate a content type, select **False**.

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Related topics

Community content types

Configure video sources for a community

Configure additional sources that can be used for uploading a video to the community.

Before you begin

Role required: sn_communities.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Video Configuration**.
2. Click **New**.
3. On the form, fill in the fields.
   For field description, see Video Configurations form fields.
4. Click **Submit**.

Configure community forums

A forum is a place for users to share content, exchange notes, ask and answer questions, and so on. Before community users can contribute content, configure a forum with content types and permissions, and create and add topics to one or more forums.

Before you begin

Role required: sn_communities.admin or sn_communities.forum

_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

A forum is the container for user-created content. A forum must be configured with content types and permissions before becoming available for users to contribute content. Forums can be organized hierarchically using the **Parent** field. Once forums are set up, they are visible on the Community homepage based on user permissions.

A topic is an area of interest that users can discuss. Topics are visible from the Community homepage and also appear within forums. They can be organized hierarchically using the **Parent** field.

- The community admin creates topics and can associate a topic with one or many forums.
- Forum admins can associate topics with their own forums.
- If a user has access to a particular forum, they also have access to all its topics.

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Procedure

Configure one or more of the following for community forums and topics.

Create a forum

Create a forum to provide a place for users to share content. You can configure forums for membership that registered community users request access to join. You can also configure forums to convert unstructured conversations to structured knowledge articles.

Before you begin

Role required: sn_communities.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

A forum can be configured in the following ways.

Options included in the forum configuration

Public	Visible to all users, including non-logged in users. All users have **content_read** access to questions and answers in public forums. Configure public forms by adding a forum user of the type public.
Private	Visible only to users who have been assigned the required permissions in the forum. Configure private forums by adding a forum user of the type custom and adding specific users or user groups to that forum user.
Membership	The forum title is visible to registered community users. Community users must request membership to get full access to the content in the forum. Configure membership forums by selecting the **Enable Membership for this Forum** check box.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. In the Forums list, click **New**.
3. Fill in the fields on the **Forum New record** form.
   For field description, see Forum form fields.
4. To allow registered forum users to view and request to join a forum, select the **Enable Membership for this Forum** check box and complete the following steps.

   a. Right-click the form header and click **Save**.
   Two default permissions are added to the forum in the **Forum Permissions** related list.

   - **Default Permission for Memberships**: Read and write access to questions and answers for users who are forum members.
   - **Forum Visible**: Read access to the name and description of the forum for registered users. To access content, users must request forum membership.

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b. If required, you can add a new forum permission and set it as the default using the sn_communities.default_permission_for_forum_memberships property.

Example
If you want public users to view content in the forum to attract them to become members, create a forum permission as follows:

- **Forum User**: **Public**.
- **Permission**: **Question & Answer Read**.

c. In the **Approval Flow for Membership** field, perform one of the following options.

Option	Description
Leave the Approval Flow for Membership field blank.	Membership requests to the forum are auto matically approved.
Select the preconfigured approval flow Fo rum Membership Approval.	A task is created and sent to the community or forum administrator for approval.
Select a flow that you have created.	A task is created and sent to the users de fined in your flow for approval.

5. Click **Update**.

Related topics

Add a topic to a forum

Configure community content types

Create a forum permission

Configure content types for a forum

Define which types of content to use in a particular forum and associate a workflow so that content is reviewed before becoming visible to other community users.

Before you begin

Role required: sn_communities.forum_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. In the **Content Types** related list, click **New**.
4. In the Content Types list, select a **Content Type**.
5. Select an **Approval Flow**.

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If you signed up before the Zurich release you will see two fields, **Approval Flow** and **Approval Workflow**. You are recommended to set only one of them. The **Approval Flow** field setting takes precedence if both are set.

6. Click **Submit**.

Result

The selected content type is added to the **Content Types** related list in the forum. The following secondary content types are automatically added when creating a primary content type.

Content types included in a forum

Primary content type	Secondary content type
Question	Answer
Blog, Document, Event, Video	Comment

Invite users to become members of a forum

Invite users to become members of a particular forum to encourage greater community involvement.

Before you begin

Role required: sn_communities.admin or sn_communities.forum_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Forums**.
2. Choose a forum from the list that has been configured for membership.
3. Select the **Invite Users to Join this Forum** related link.
4. Complete the following steps to invite internal and external users.

   a. If the users to send the email invitation to are internal, click **Edit Users**.

   b. If external user registration is enabled, the **Enter email address** field is shown.

      Enter the email addresses of the external users to send the email invitation to.

   You can enter both internal and external users to your email invitation.
5. Enter **Comments** to personalize the text in the email invitation.
6. Click **Submit**.
   An email is generated and sent to the users in the list. The approval workflow set in the forum determines the approval of membership from an email invitation. You can view all email invitations in the forum on the **Forum Email Invites** related list.

Approve forum memberships

Manage forum membership approvals when registered community users request membership to a forum.

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Before you begin
Role required: sn_communities.admin or sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task
There are two ways of approving forum memberships.

Procedure
1. Perform one of the following actions.
   - Navigate to **Community** > **Forums**.
     a. Choose a forum from the list that has been configured for membership.
     b. Click the **Membership Approvals** related list.
   - Navigate to **Self-Service** > **My Approvals.**
2. Accept or reject the membership requests.
   Only one approval is required for each task.
   Once the task has been approved or rejected, an email notification is sent to the user.

Create a topic

Create a topic for users to create and share content.

Before you begin
Role required: sn_communities.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Topics**.
2. Click **New**.
3. On the form, fill in the fields.
   For field description, see Topic form fields.
4. Click **Submit**.
   The topic is created and added to the list of topics.

What to do next
Add a topic to a forum. For details, see Add a topic to a forum.

Add a topic to a forum

Add a topic to a forum so that users can associate content to that topic.

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Before you begin
Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task
A topic can belong to more than one forum.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. In the list, click the forum name.
3. Click the **Forum Topics** related list.
4. Click **New**.
5. From the **Topic** list, select a topic.
6. Click **Submit**.
   The selected topic is added to the Forum Topics list in the forum. The topic is available to users in this forum.

Disable topics in a community

Disable the topics feature so that no topic information is visible in your community.

Before you begin
Role required: sn_communities.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task
The administrator can change the *`sn_communities.enable_topics`* property so that all topic information is hidden in the community. The data is not deleted.

Procedure
1. Enter `sys_properties.list` in the filter navigator and search for the *`sn_communities.enable_topics`* property.
2. In the **Value** field, enter `false`.
3. Click **Update**.
   - No topic information is displayed in the **Activity Feed** or **Notifications and Subscriptions**.
   - No topic information is displayed on the **Forums** or **Topics** landing pages.
   - No topic information is displayed on Gamification pages and widgets.
   - Topic fields do not appear when creating, editing, or viewing content.
   - Topics do not appear in the search results page.

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Create a sub forum

Create a sub forum and map it to a parent forum to establish a forum hierarchy.

Before you begin

Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

There are two ways of creating a sub forum in Communities.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
   - On the Forums list page, click **New**.
   - Locate the forum to create a sub forum in, click its name, and then click the **Sub Forums** related list.
2. Fill in the fields on the **Forum New record** form.
   For field description, see Forum form fields.

Result

The forum hierarchy of forums and sub forums is displayed on the community home page, forum landing page, when creating questions, blogs, or events, and in the search filters.

Move forum content

Move community content posts from one forum to another.

Before you begin

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.forum_admin, sn_communities.forum_moderator

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Access to content is based on permissions to a specific forum. If content is moved, the author of the content and other community users might lose access to it, depending on their forum permissions.

> **Note:** Draft content cannot be moved. If the content type is not supported in the new forum, it cannot be moved.

Procedure

1. Navigate to the community homepage.
2. Click the content you want to move.
3. Click **...** and **Edit**.

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4. Select the forum you want to move the content to.
5. Click **Save**.
   An email notification is sent to the author of the content, subscribers to the content, and subscribers to the forum.

Forum and user permissions management

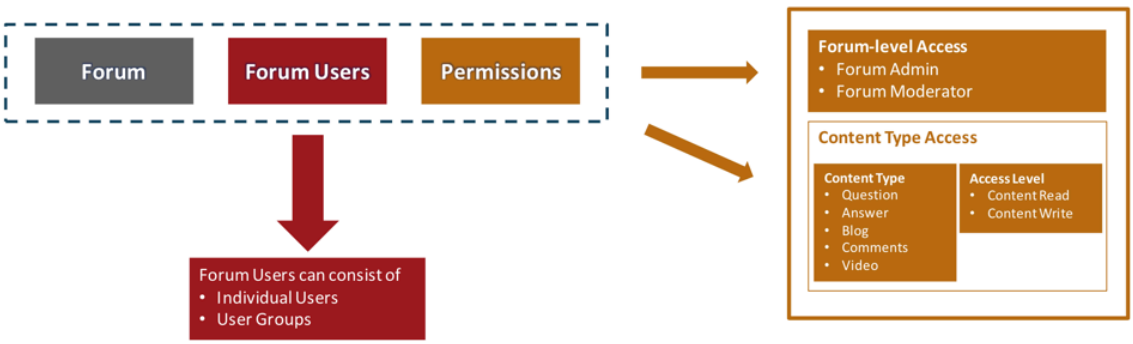
Community and forum administrators can give users and groups of users different levels of access to forums and forum content.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Note: By default, community content is not publicly accessible. A community administrator must enable public access by configuring the appropriate permissions.

There are three components that make up the security settings for forums: forum users, permissions, and forums.



Forum users

A forum user is a logical group of users, user groups, or both. This group is used to define memberships to a forum.

Permissions

A permission is a combination of:

- access types for a forum
- access types for a given content type

Forums

A forum is the container for user-created content. A forum must be configured with content types and permissions before becoming available for users to contribute content.

You can create your own permission or use one of the default permissions that the Communities application delivers.

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Default permissions

Permission	Description
Blog Read	Read access to blogs.
Blog Read and Comment Write	Read access to blogs and write access to comments.
Blog Write	Write access to blogs.
Blog Write and Comment Write	Write access to blogs and comments.
Default Permission for Memberships	Default permissions for forums that are marked as **Enable Membership for this Forum**.
Default permissions for public user	Public access to forums.
Default permissions for registered user	Permissions for registered and logged in users.
Document Read and Comment Write	Read access to documents and write access to comments.
Document Write and Comment Write	Write access to documents and comments.
Event Read and Comment Write	Read access to events and write access to comments.
Event Write and Comment Write	Write access to events and comments.
Forum Admin	Full access to a forum.
Forum Moderator	Moderation access to a forum.
Forum Name and Description Read	Read access to the name and description of a forum. To access content or topics, other permissions are required.
Full Access	Write and read access to all content types.
Question and Answer Read	Read access to questions and answers.
Question and Answer Write	Write access to questions and answers.
Question Write	Write access to questions.
Video Read and Comment Write	Read access to videos and write access to comments.
Video Write and Comment Write	Write access to videos and comments.

To assign permissions to users and user groups, create associations between forum users and permissions for a specific forum.

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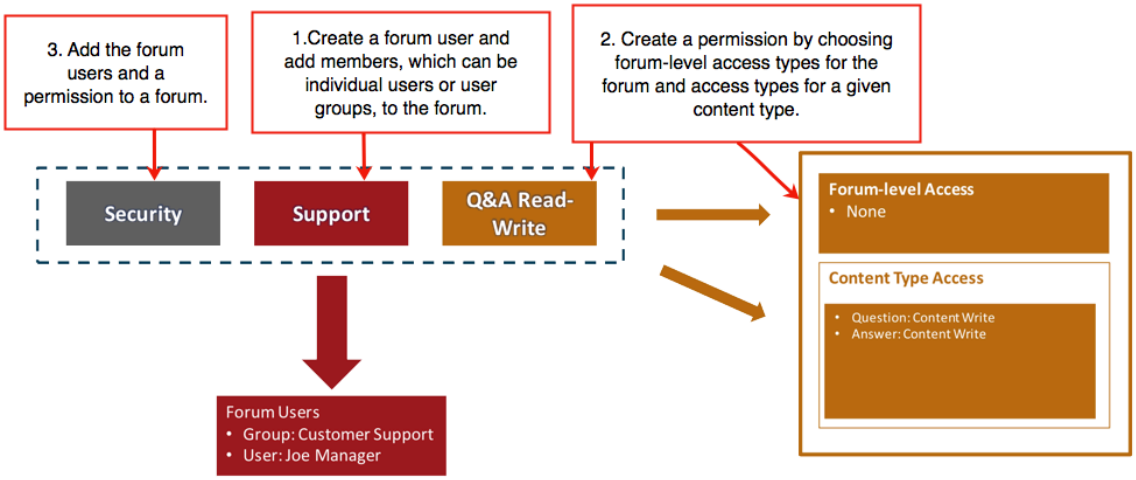

Note: Forum permissions are not inherited in the forum hierarchy. Each subforum must be configured with its own set of permissions and content types.

- You can use forum users and permissions in multiple forums.
- You can add multiple forum users and permissions to one forum.
- You can copy permissions from a parent forum to a child forum or from another forum altogether.
- You can also define user-specific permission exceptions and debug user permissions.

Create a forum user

You can create forum users, which you then use to define memberships to a forum.

Before you begin

Role required: sn_communities.forum_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

A forum user is a set of users and user groups. Forum users are reusable. Multiple forum users can be used in any given forum.

Note: Before creating a forum user, check whether an existing forum user matches your requirements.

Types of forum user

Public	Public users can view the community without logging in. By default, public users have **content_read** access to questions and answers in public forums.
Registered	Users who have signed up to the community and accepted the Terms & Conditions. Once logged in, their access to forum content depends on the permissions set up for each specific forum.

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Types of forum user (continued)

Custom	Specific users and user groups that are added as members to the current forum user.
Membership	A group of members who have joined a specific forum. Once logged in, their access to forums depends on the permissions set up for each specific forum.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forum Users**.
2. Click **New**.
3. On the form, fill in the fields.

Forum User form

Field	Description
Name	Name of the user.
Description	Description of the user.
User type	Type of user.

4. Click **Submit**.
   The forum user is created and added to the Forum Users list.

Add members to a forum user

Add members to a forum user. Members can be individual users or user groups.

Before you begin

Role required: sn_communities.forum_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forum Users**.
2. Click the forum user to add members to.
3. In the Members related list, click **New**.
4. On the form, fill in the fields.

Members form

Field	Description
Forum User	Forum user name. The name is automatically filled.

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Field	Description
Membership Type	Membership type. Choose either **User** or **Group**.
Member	User or user group to add to the forum user. If you selected **Membership Type** > **User**, the **Table name** is automatically filled with *sys_user*. If you selected **Membership Type** > **Group**, the **Table name** is automatically filled with *sys_user_group*. Enter your user or user group in the**Document** field.

5. Click **Submit**.

Create a permission

Create a permission to use to define a user's access to a forum and the content in the forum.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Permissions are reusable. Before creating a permission, check if any existing permissions match your requirements.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. Click **New**.
3. On the form, fill in the fields.

Permission form

Field	Description
Name	Name for the permission.
Description	Description of the permission.

4. Click **Submit**.

Add access types to a permission

Access types for a permission determine the access that users have to certain forums.

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Before you begin

Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. In the **Permissions** list, click the permission you created.
3. Click the **Forum Access** related list.
4. Click **New**.
5. Select an access type.
6. Click **Submit**.

What to do next

Create a forum permission.

Related topics

Community content types

Community access types

Add content types to a permission

Content types for a permission determine the access that users have to certain content in a forum.

Before you begin

Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. In the **Permissions** list, click the permission you created.
3. Click the **Content Type Access** related list.
4. Click **New**.
5. Select a content type and an access type.
6. Click **Submit**.

Create a permission exception

Create a permission exception for users who require specific permissions for a forum.

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Before you begin

Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Permission exception records are created for users who require specific permissions for a particular forum, for example, a forum manager. Any other permissions that the user has are no longer valid once an exception is created.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. Click the **Permission Exceptions** related list.
   The list of users who have extra permissions for this forum is displayed.
4. Click **New**.
5. In the **User** field, enter the name of the user to create a permission exception for.
6. In the **Permission** field, enter a permission.
7. Click **Submit**.
   A permission exception is created and added to the list of **Permission Exceptions** on the forum.

Clone a permission

Clone a permission if an existing permission record cannot be modified and you require a permission record with similar settings.

Before you begin

Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Administration** > **Permissions**.
2. Click the permission you want to clone.
3. Click the **Clone** related link.
   A new permission with the same access types as the source permission is created. The permission record name starts with **Clone of**.

Create a forum permission

Add a forum user and a permission to a forum to create a forum permission.

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Before you begin
Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task
Forum permissions are a combination of a forum, forum users, and permissions. Associate forum users and permissions within a specific forum. You can add multiple combinations of forum users and permissions to a forum.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. In the **Forum Permissions** related list, click **New**.
4. On the form, fill in the fields.

Forum Permissions

Field	Description
Forum	Name of the forum.
Forum Users	User or group of users to give access to the forum.
Permission	Permission to give to the forum users in the forum.

5. Click **Submit**.

Copy permissions from a parent forum
You can copy permissions from a parent forum to a child forum.

Before you begin
Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click a forum.
3. Click the **Copy Permissions from Parent Forum** related link.
   All permissions and content types are copied from the parent to the child forum. A summary of the results is displayed at the top of the form.

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What to do next
Configure the forum users and permissions as required.

Copy permissions from a forum

You can copy all permissions and content types from one forum to another.

Before you begin
Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task
You can copy permissions from one source forum to multiple target forums.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click the name of the forum that you want to copy permissions from.
3. Click the **Copy Permissions to Forum(s)** related link.
4. On the form, fill in the fields.

Copy Permissions

Field	Description
Copy Permissions From	Name of the forum you want to copy permissions from. The name is automatically filled.
Copy Permissions To	Name of the forum you want to copy the permissions to. You can enter more than one forum.

5. Click **Save**.

Debug user permissions

Investigate and diagnose problems with user access to forums.

Before you begin
Role required: sn_communities.forum_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure
1. Navigate to **All** > **Community** > **Administration** > **Forums**.
2. Click the name of the forum to investigate.

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3. Click the **Debug Forum Permissions** related link.
4. Enter the name of the user you want to check the permissions for.
   The forum user permissions information indicates which content and access types the user has for a particular forum.

Configure the community profile

Set up the community profile by configuring profile fields and deciding which fields to display in the personal information section of the community profile.

Before you begin

Role required: sn_communities.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

Configure one or more of the following for the community profile.

Create a persona for the community profile

Create a persona and associate it to a role to manage which data users can modify.

Before you begin

Role required: sn_communities.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

A persona is associated to a user role and can be mapped to specific fields for display on the community profile. The base system contains a default persona, which is not associated to a role and is used for all community users. You can create a new persona or add a role to the default persona.

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Persona**.
2. Click **New** and then complete the Persona form.

Persona configuration form

Field	Description
Name	A name for the persona.

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Field	Description
Order	The order, in numerical value, in which the system should evaluate the roles for the persona.
Associated Role	The role to associate the persona to.

3. Click **Submit**.

Create a community profile field

Create a field to display on the community profile.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Profile Fields**.
2. Click **New**and then complete the Profile Fields form.

Profile field configuration form

Field Label	A label for the field.
Field Name	A name for the field.

3. Click **Submit**.

Configure persona field mapping for the community profile

Configure which fields appear in the community profile and manage the settings associated with those fields.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Persona Field Mapping**.
2. Click **New**and then complete the Persona Field Mapping form.

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Persona Field Mapping form

Field	Description
Persona	Name of the persona.
Source Value Table	Source table of the field to be added to the persona. Any table that is used as the **Source Value Table** should have a reference to the sys_user table.
Source User Field	Field from the source value table.
Privacy Read Only	Select the check box to allow the community user to change the display settings for this field in their community profile.
Profile Field	Display name of the community profile field.
Source Value Field	Name of the field from the source table.
Read Only	Select the check box to not allow the community user to edit the value of this field.
Privacy Default	Privacy default setting for the field. It shows the field for the selected group of users. The available options are: ○ Everyone ○ Everyone after logging in ○ Only me ○ Followers

3. Click **Submit**.

Create community Terms and Conditions

Community members must follow the community rules of conduct. Create community Terms and Conditions and them share to build a successful community. Every community user must review and accept the Terms and Conditions before contributing to a community.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

The Communities application includes preconfigured Terms and Conditions that you can modify according to your needs.

You can disable Terms and Conditions using the *sn_communities.disable_terms_conditions_role* property. The community profile isn't created.

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Procedure

1. Navigate to **All** > **Community** > **Administration** > **Communities Terms and Conditions**, click **New**, and then fill in the fields.

Terms and Conditions form

Field	Description
Number	An automatically generated number for your Terms and Conditions. If required, you can change the number.
Short Description	A short description for your Terms and Conditions.
Content	The content of your Terms and Conditions.

2. Complete one of the following actions to save the Terms and Conditions.

To	Do this
Submit	Click **Submit** to save your Terms and Conditions.
Activate	**a.** Click **Activate**. Your Terms and Conditions are activated and any existing Terms and Conditions are deactivated. **b.** Select the check box on the warning message if you want all community users who log on to accept to the new Terms and Conditions. The check box is selected by default. **c.** Deselect the check box if you want users to accept the new Terms and Conditions at a later point in time. You can then select your Terms and Conditions and click **Prompt users to review and accept**. **d.** Click **OK**.

You can view which community users have accepted the Terms and Conditions and when. Navigate to **Community** > **User Profile** > **Community Profiles**. View or add, if necessary, the **Accepted TC**, **Accepted TC Date**, and **Accepted TC Number** fields.

Enable users to self-register to a community

Once users have accessed public forums and decided they want to join the community, they can self-register to the community. External user registration provides a way of validating users and requires them to accept the community Terms and Conditions.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Community administrators perform the following tasks to configure external user registration.

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- Configure the external user registration properties.
- Configure moderation filters to enter banned words for the user name.
- Configure the required strength for passwords.
- Create an email template and content. The email template that you can change is **communities.ext.regn.confirm**.
- If not already configured, create community terms and conditions that each community user must review and accept. Communities delivers preconfigured Terms and Conditions that you can modify according to your needs.
- To enable external users to update their time zone when registering, add ACLs to external users in the User table [sys_user].

Moderate a community

Community moderators can manage content quality by reducing the inappropriate content that is posted on the community.

Before you begin

Role required: sn_communities.community_moderator, sn_communities.forum_moderator, or sn_communities.moderation_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Define your requirements for Community moderation.
   - Should first-time posters receive automatic moderation?
   - Which words should be banned from user content?
   - Should the system prevent content containing banned words from being posted?
   - Should users be able to report inappropriate content?
   - How many offenses can a user commit before the system bans them automatically?
2. Navigate to **Community** and choose the **Moderation** or **Moderation Tasks** menu and the module you require.
3. Configure one or more of the following aspects for your community.

Configure general moderation settings

Configure when to moderate content for users and user groups.

Before you begin

Role required: sn_communities.admin, or sn_communities.moderation_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. On the form, fill in the fields.

Moderation Settings form

Field	Description
Users Never Moderated	Content is never moderated for these users.
Users Always Moderated	Content is always moderated for these users.
User Groups Never Moderated	Content is never moderated for these user groups.
User Groups Always Moderated	Content is always moderated for these user groups.
Hide content if user violates settings	Check box to hide content written by a user until a moderator approves it.

3. Click **Update**.

Configure moderation settings for a new user

Configure the system to prevent inappropriate user contributions.

Before you begin

Role required: sn_communities.admin or sn_communities.moderation_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. Click the **New User** related list.
3. On the form, fill in the fields.

Moderation Settings form

Field	Description
New User Content Threshold	Number of user posts to be moderated.
User Exception List	New users that are not included in the new user content threshold for moderation.
User Group Exception List	User groups that are not included in the new user content threshold for moderation.

4. Click **Update**.

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Assign a moderation task to your assignment group

Change the assignment group to assign a moderation task to your assignment group.

Before you begin

Role required: assignment_rule_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

A moderation task is generated when a community user reports inappropriate content or community profiles. By default, the system assigns the task to the community moderator group. You can also configure your system to always require content moderation for a particular user or group.

Procedure

1. Navigate to **All** > **Routing and Assignment** > **Assignment Rules**.
2. On the Assignment Rules page, search and select `sn_communities_moderation_task` in the **Table** column.
3. On the Moderation Task Assignment Group page, enter the User and Group details in the **Assign To** tab.
4. Select **Update**.

Configure abuse reporting

Configure whether users can report content and profile abuse, set an abuse reporting threshold, and define reasons for abuse reporting.

Before you begin

Role required: sn_communities.admin or sn_communities.moderation_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. Click the **Abuse** related list.
3. On the form, fill in the fields.

Moderation Settings form

Field	Description
Enable Content Abuse Reporting	Check box to enable users to report inappropriate content.

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Field	Description
Enable Profile Abuse Reporting	Check box to enable users to report inappropriate profiles.
Abuse Reporting Threshold	Number of abuse reports on a specific content (question, blog, video, answer, comment) that lead to the content being hidden from other users.
Content Abuse Reporting Reasons List	Phrases that are possible reasons for the user to report inappropriate content contributions. Separate each phrase using the pipe symbol|. For example, This content is abusive|This content used an offensive word|Spam|Inappropriate media.
Profile Abuse Reporting Reasons List	Phrases that are possible reasons for the user to report an inappropriate user profile. Separate each phrase using the pipe symbol|.

4. Click **Update**.

Configure user banning

Set the number of offenses a user can make before they are banned from creating or editing content.

Before you begin

Role required: sn_communities.admin or sn_communities.moderation_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Settings**.
2. Click the **User Banning** related list.
3. On the form, fill in the fields.

Moderation Settings form

Field	Description
Enable Banning Users	Check box to enable the banning of users.
Offense Threshold	Number of offenses a user can make before being automatically banned.

4. Click **Update**.

Configure moderation filters

Create moderation filters to manage how content is moderated.

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Before you begin

Role required: sn_communities.admin or sn_communities.moderation_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Moderation** > **Moderation Filters**.
2. Click **New**.
3. Click **Banned Keyword Filter**.
4. On the form, fill in the fields.

Moderation Banned Keyword Filter form

Field	Description
Filter Name	Name of the filter.
Active	Check box to make the filter active.
Synchronous	Check box to automatically moderate content when it is submitted. Any content that includes the banned words defined in the filter is not posted. If the check box is cleared, the system creates a moderation task when banned words are used. The content is visible until it is moderated.

5. Click **Submit**.
6. From the Moderation Filters list, click the name of your filter.
7. Add a banned keyword word to the list:
   a. In the **Keywords**list, click **New**.
   b. In the Keyword field, enter your keyword.
   c. Click **Submit**.
   d. If required, repeat to add more keywords to the list.
8. Click **Update**.

Ban a user

You can ban a user from creating or editing content, for example, a user can be banned for posting inappropriate content.

Before you begin

Role required: sn_communities.admin, sn_communities.moderation_admin, or sn_communities.community_moderator

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Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **User Profile** > **Community Profiles**.
2. On the Community Profile, search the user in the **Live Profile** column.
3. Hover on the user and select the Preview icon (ⓘ).
4. On the Community Profile window, select **Open Record**.
5. On the Community Profile page, select **Ban User**.
   The user is banned. In the Community Profiles list, the value in the **Banned** column is set to **true**.

Revoke a user ban

Revoke a user ban to allow a user to create and edit content again.

Before you begin

Role required: sn_communities.admin, sn_communities.moderation_admin, or sn_communities.community_moderator

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Perform either of the following actions.
   - Navigate to **Community** > **User Profile** > **Community Profiles**.
   - Navigate to **Community** > **Moderation** > **Users Banned by Moderation**.
2. Click the Preview icon next to the user and then select **Revoke User Ban**.
   The user ban is revoked. In the Community Profiles list, the value in the **Banned** column is set to **false**.

Approve or reject content

Approve or reject content that a user reported as inappropriate or that is associated with a particular community profile.

Before you begin

Role required: sn_communities.community_moderator, sn_communities.moderation_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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About this task

A moderation task is generated when a community user reports inappropriate content or community profiles. By default, the system assigns the task to the community moderator group. You can also configure your system to always require content moderation for a particular user or group.

Each task requires the moderator to approve or reject the reported item. If the moderator rejects content, it is counted as an offense against the community user who contributed the content.

Procedure

1. Navigate to **All** > **Community** > **Moderation Tasks** > **Assigned to me**.
2. Click a moderation task.
3. On the form, fill in the fields.

Moderation Task form

Field	Description
Assigned to	Person assigned to the task.
Moderation Notes	Notes entered by the user when reporting the content.
Resolution Notes	Your comment as you moderate the content.
Work Notes	Work notes entered by users working on the task.
Approve Content	Approve content that conforms to community rules. The content state changes to Closed Complete.
Reject Content	Reject content or a profile. The content state changes to Closed Complete and the content is hidden in the community.

Note: You can review the outcome of existing and past moderation tasks by navigating to **Community** > **Moderation** > **Moderation Outcomes**. Click a task to view the details of the moderation task.

Disable comments

Disable comments on a blog, document, video, event, or question to avoid users from posting comments.

Before you begin

Role required: sn_communities.forum_moderator, sn_communities.community_moderator, sn_communities.moderation_admin, or sn_communities.forum_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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About this task

There are two ways of disabling comments on the community content. You can disable comments while posting new content or restrict users from posting comments on existing content.

Note: You can disable replies on an existing question to restrict users from posting further comments. You can't post a new question when replies are disabled.

Procedure

Navigate to the community home page.

- To disable comments on new community content:
  - **a.** Choose the content type that you want to post.
  - **b.** Fill the details.

    Note: Disable Comments check box is visible only after filling details on the form.

  - **c.** Select the **Disable Comments** check box.
  - **d.** Select **Publish**.
- To disable comments on existing community content:
  - **a.** Choose the content that you want to disable the comments for.
  - **b.** Select the more options icon (···) and then select**Edit**.
  - **c.** Select the **Disable Comments** check box.
  - **d.** Select **Save**.

A confirmation message appears stating that you have disabled comments. The comments on the existing content are displayed. You can't edit an existing comment or post a new comment. All community and forum administrators and the content author receive an email notification when you disable or enable comments.

Related topics

Post and respond to content in the community

Remove content

Remove content that does not meet community standards.

Before you begin

Role required: sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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Procedure

1. Navigate to **All** > **Community** > **Content** > **Contents**.
2. Click the content to remove.
3. Click **Actions on selected rows** > **Delete** and confirm that you want to delete the item.

Harvest knowledge from a community

Harvest knowledge from a community and create structured knowledge articles from unstructured discussions around a question.

Before you begin

Role required: sn_communities.knowledge_harvester, sn_communities.admin, or sn_communities.moderation_admin

Knowledge harvesting must be enabled.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

You can only harvest solved questions with accepted solutions into a knowledge article.

Procedure

1. From the Communities homepage, perform one of the following actions.
   - Go to the Content List.
   - Click a forum.
   - Search for a discussion thread (Question and Answer).
2. Click **Question State** > **Solved** to filter for all discussions that can be converted into knowledge articles.
3. Click a question.
4. Click the **...** icon and then **Harvest Knowledge**.
5. Fill in the fields on the Harvest Knowledge form.

Harvest Knowledge form

Field	Description
Short description	The original question is automatically entered in the **Short description** field. You can edit the short description, as required.
Attachments	All attachments associated with the question and accepted solution are automatically added to the knowledge article. You can add and remove attachments.
Text	The body of the original question and accepted solution is automatically entered in the **Text** field. You can edit the text, as required.

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Field	Description
Knowledge base	The knowledge base to which the knowledge article has been added. It is added by default based on the knowledge base associated to the forum from which article was harvested. If required, you can change the knowledge base.
Category	The category of the knowledge article. It is entered by default based on the category associated to the topic from which the article was harvested. If required, you can change the category.
Number	A KB (Knowledge Base) number is automatically assigned to the article. You cannot edit the **Number** field.

6. Perform one of the following actions.

To	Do this
Publish	Click **Publish** to initiate the workflow associated with the knowledge base. A link to the knowledge article is displayed on the community question from which it was harvested. A link to the community question and to the community profile of the person who answered the question is displayed in the knowledge article. **Note:** You can only see the links if you are a logged-in community user and have been assigned the correct permissions in the forum.
Save	Click **Save** to save the knowledge article as a draft. To publish the knowledge article at a later point in time, navigate to the platform UI and then **Knowledge** > **Articles** > **Unpublished**.
Delete	Click **Delete** to delete the knowledge article and all records associated with the KB number.

Administer gamification

Users with the gamification administrator role can create the rules and other entities that award points to users based on their participation within the community.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Configure gamification properties

Configure gamification properties to meet your company's needs.

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Before you begin

Role required: sn_gamification.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Gamification Properties**.
2. Enter the number of days to store the gamification activity history.
   The default is 180 days. A scheduled job purges the points history that is older than 180 days. This purge does not delete the aggregated data.
3. Enter the maximum number of levels that can be defined.
4. Click **Save**.

   Additional properties can be configured for the gamification feature. For more information, see Gamification properties.

Create a gamification rule

Create gamification rules so that users can earn points for community activities.

Before you begin

Role required: sn_gamification.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Rules**.
2. Click **New**.
3. Fill in the fields on the Gamification Rule form as necessary.

Gamification rule configuration form

Field	Description
Rule Name	A descriptive name for the gamification rule.
Gamification Module	The application to which this rule applies. Click the lookup icon to select a module from the Gamification Modules list. The default is **Community**.
Activity Type	The user activity for which this rule applies. Click the lookup icon to select one of the available types from the Activity Types list.
Profile Receiving Points	The type of user profile that earns points for performing the activity defined in this rule. Click the lookup icon to select a profile corresponding to the activity.

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Field	Description
Exclude Self-Award	Check box to ensure that the activity performer is not the same as the profile receiving points.
Active	Enable this check box to activate the rule. The default is set to active.
Gamification Track	The gamification track to which this rule belongs. Click the lookup icon to select one of the available tracks from the Gamification Tracks list. By default, two tracks are available: ○ Community Expertise ○ Community Participation
Points	The number of points earned by performing the activity defined in this rule.
Points for Areas of Expertise	The points accrued can be used towards a forum or topic level expertise. Click the lock icon to expand the field and configure if the points should accrue towards a forum and/or topic.

4. Click **Submit**.
   The newly created rule appears on the Gamification Rules list. This rule appears on the How to Earn Points page.

Create a gamification track

Create tracks to provide a logical way to separate points assigned in the communities into different areas.

Before you begin

Role required: sn_gamification.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Tracks**.
2. Click **New**.
3. Fill in the fields on the Gamification Track form as necessary.

Gamification track configuration form

Field	Description
Track Name	A descriptive name for the gamification track.
Gamification Module	The module to which this track applies. Click the lookup icon to select a module from the Gamification Modules list. By default the module is set to Community.
Active	Enable this check box to activate the track. By default this field is set to active.
Application	The application to which this track applies. By default the module is set to Community.

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Field	Description
Track Display Order	The order in which the track appears.

4. Click **Submit**.
   The newly created track appears on the Gamification Tracks list.

   Note: While tracks can be configured, it is not currently displayed anywhere on the Community portal.

Create a gamification badge

Create gamification badges that users can earn for achievements within the community.

Before you begin

Role required: sn_gamification.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

The gamification feature includes several predefined badges.

Procedure

1. Navigate to **All** > **Community** > **Gamification Administration** > **Badges**.
2. Click **New**.
3. Fill in the fields on the Gamification Badge form as necessary.

Gamification badge configuration form

Field	Description
Gamification Module	The application to which the badge applies. The default module is **Community**.
Badge Name	The name of the badge as it appears on the Community portal.
Badge Display Order	The order of the badge indicates the rank. If a community user has multiple badges assigned to them, this field determines the sequence in which the badges are displayed.
Active	Enable this check box to activate the badge.
Description	A brief description of the badge as it appears on the Community portal.
Badge Icon	The image file for the badge. Click to add the icon, choose the desired image file, and then click **OK**. **Note:** The recommended image size for ideal performance is 50 pixels by 50 pixels and less than 500KB.

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4. Click **Submit**.
   The newly created badge appears on the Gamification Badges list.

Manage gamification levels

Manage the predefined levels for global, forum, and topic expertise.

Before you begin

Role required: sn_gamification.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Gamification includes predefined global, forum, and topic levels.

Procedure

1. Navigate to **All** > **Gamification** > **Configuration** > **Levels**.
2. View the existing definitions for global, forum, and topic levels.
3. Change the **Level Name** if required.
4. Click **Submit**.
   Adding new level definitions is not recommended unless there is a strong use case. If you need to add or modify level ranges in existing level definitions, see Manage gamification level ranges.

Manage gamification level ranges

Manage level ranges for a gamification level definition, to recognize the expertise level of your community users.

Before you begin

Role required: sn_gamification.admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Gamification includes predefined global, forum, and topic levels. Each level definition can have several level ranges and the system is predefined with 10 ranges for global level and five ranges each for the forum and topic levels. Each range should not overlap and must have a unique start value.

Procedure

1. Navigate to **All** > **Gamification** > **Levels**.
2. Select the desired level (global, forum, or topic).
3. Modify the **Level Range Name**.

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4. Modify the **Points Start** field.
   Each range should not overlap and must have a unique start value.
5. Click **Submit**.
   Level ranges are updated on the Community portal.

Community Service Portal

The Community Service Portal is a web interface that is based on the ServiceNow Service Portal application.

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

The Community Service Portal is designed to allow you to have control over the behavior of your portal and help create an attractive and engaging user experience.

Customize Community Service Portal

Customize community service portal according to your needs.

Before you begin

Role required: sp_admin

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **Service Portal** > **Portals**.
2. Select **Community**.

Configure Community Service Portal header menus

Configure Community Service Portal header menus to create a consistent user experience across all your end-user facing service portals using a modern interface and a unified navigation menu structure.

Before you begin

Role required: The admin role for your service portal, for example, sp_admin.

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

Add a theme and header menu to your service portal to define its look and behavior.

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Procedure

1. Navigate to **All** > **Service Portals** > **Portals** and click the module for the portal you want to modify.
2. In the information message on the Page form indicating that you have to change the current application to edit the record, select **here**.
   You have to be in the **Communities** application to edit.
3. In the **Theme** field, enter `CSM Default`.
4. In the **Main Menu** field, enter `CSM Unified Portal Header Menu`.
5. Click the information icon next to the **Main menu** field and click **Open Record**.
6. Click the Settings icon and **System Settings** > **Developer**.
7. Change the **Application** to **Customer Service Management Unified Theme** and click the Refresh icon.
   You only have to change this setting once.
   The **New** button is displayed next to **Menu Item**.
8. To display the names of the menu items, personalize the Menu Items related list and add **Display name**.
9. Click **New** from the Menu Items related list.
10. Fill in the fields on the form.

Menu Item form

Field	Description
Label	Name that appears for the item in the menu.
Parent Menu	This field should already contain the name of the menu you are adding items to. You can change the value as required to other menus.
Parent Menu Item	Use this field to nest menu items within other menu items.
Order	Value that determines where the item appears in the menu in relation to other menu items.
Type	The kind of page the item links to. For example, you can link to another page in the portal, or an external URL. Form fields vary depending on the option you select from this list.
Page	Name of the portal page the item links to.
Condition	Determines what conditions are required for menu items to show in the header.
Glyph	Icon that appears beside the menu item

11. Select **Submit**.

Configure announcement for community members

Global announcements appear in the banner and broadcast messages to all community members. Forum announcements appear in the Announcements section on the forum page. You can also send the announcement by email.

Before you begin

Role required:

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- sn_communities.admin can manage Global announcements and Forum announcements
- sn_communities.forum_admin can manage Forum announcements for own forums only. The announcement appears only in the forum that the admin owns.

Important:

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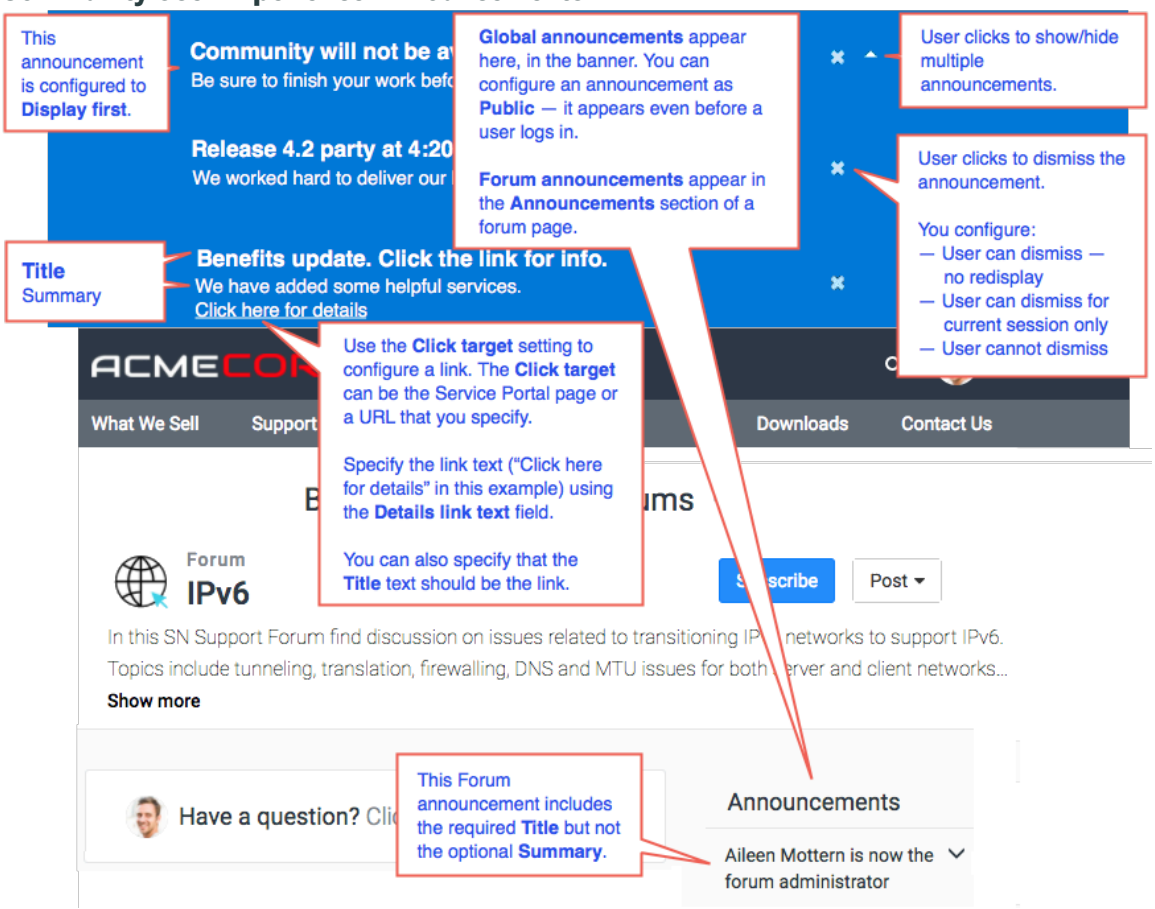
About this task

This example shows how a community user experiences announcements and how you can configure the appearance and operation of announcements.

Community User Experience Announcements



Procedure

Navigate to **All** > **Community** > **Administration** > **Global Announcements** or **Forum Announcements**, click **New**, and then fill in the form.

Announcement configuration form

Announcement type	Read-only. Set to **Global Announcement** or **Forum Announcement**, depending on what you are working on.

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Active	Select the check box to publish the announcement to members. Clear the check box to cancel the announcement.
Title	Display title of the announcement. • The text appears above the **Summary** text. • In email, the text is the subject of the message.
Summary	Content of the announcement. • The text appears below the **Title** text. • In email, the text is the body of the message.
From / To	• **From**: Date and time that the announcement should appear. • **To**: Date and time that the announcement should no longer appear.
Send email notification	Select the check box to send the announcement to members as an email message in addition to broadcasting the announcement.
Display first	Select the check box to display the announcement as the first announcement in the list.
Public	Select the check box to enable forum members that are not logged in to view the announcement.
Portals	Portals that display the announcement. Default: **Community**. **Note:** If no value is specified, the announcement does not appear in any portal.
Click target	The **Click target** setting creates a link for the announcement. • **None**: No link. • **Page**: Opens a Service Portal page in the current browser tab. • **URL in current browser tab**: Opens the specified URL in the current browser tab. • **URL in new browser tab**: Opens the specified URL in a new browser tab.

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Details URL	If you select a URL option for **Click target**, then enter the URL in the **Details URL** field.
Details link text	Appears only if **Click target** is not **None**. • To display a link under the **Summary** text, enter the text of the link in the **Details link text** field. • To use the **Title** text of the announcement as the link, leave **Details link text** blank.
Forums	This setting appears for Forum announcements only. Slushbucket of forums that you are admin for. Move a forum into the **Selected** list to display the announcement on the forum.
Dismiss options	This setting appears for Global announcements only. Determines how the user can dismiss the announcement.

What to do next

- To update an announcement, update any setting as needed and then click **Update**. If you specified **Send email notification**, then you are prompted to send the updated email message.
- To cancel an announcement, clear the **Active** check box.

Community pages that support SEO data

To improve search results for community members using external search engines, the Communities application generates SEO meta tags and injects the tags into questions, topics, forums, and other page types.

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Note: If the auto-generated SEO tags in a page does not meet your needs, you can change the SEO tags. See Modify SEO in community pages.

Pages that include auto-generated SEO data

The Communities application auto-generates SEO meta tags for the following pages in the Community service portal. The table provides details on the data that is generated.

- community_question
- community_blog
- community_document
- community_video
- community_event

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- community_forum
- community_topic

Auto-generated SEO tags

Searchable page type	Auto-generated tags in the page
Question, Blog, Document, Video, and Event	• The *title* meta tag is populated with the text “<forum name> - <content short description>" • The *description* meta tag is populated with the text “<forum name> - <topic names> - <first 100 characters of the body of the content>"
Forum	• The *title* meta tag is populated with the text “<forum name>" • The *description* meta tag is populated with the text “<forum description>"
Topic	• The *title* meta tag is populated with the text “<topic name>“ • The *description* meta tag is populated with the text “<topic description>"
Leaderboard page	The Title meta tag is populated with the text “<community name>”

Modify SEO in community pages

If an auto-generated SEO meta tag does not meet your needs, you can modify or replace the tag.

Before you begin

Role required: sp_admin

Important:

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About this task

The source code for this example question page (ID *community_question*) shows the *description* meta tag (highlighted in yellow) that the Communities application injected into the page.

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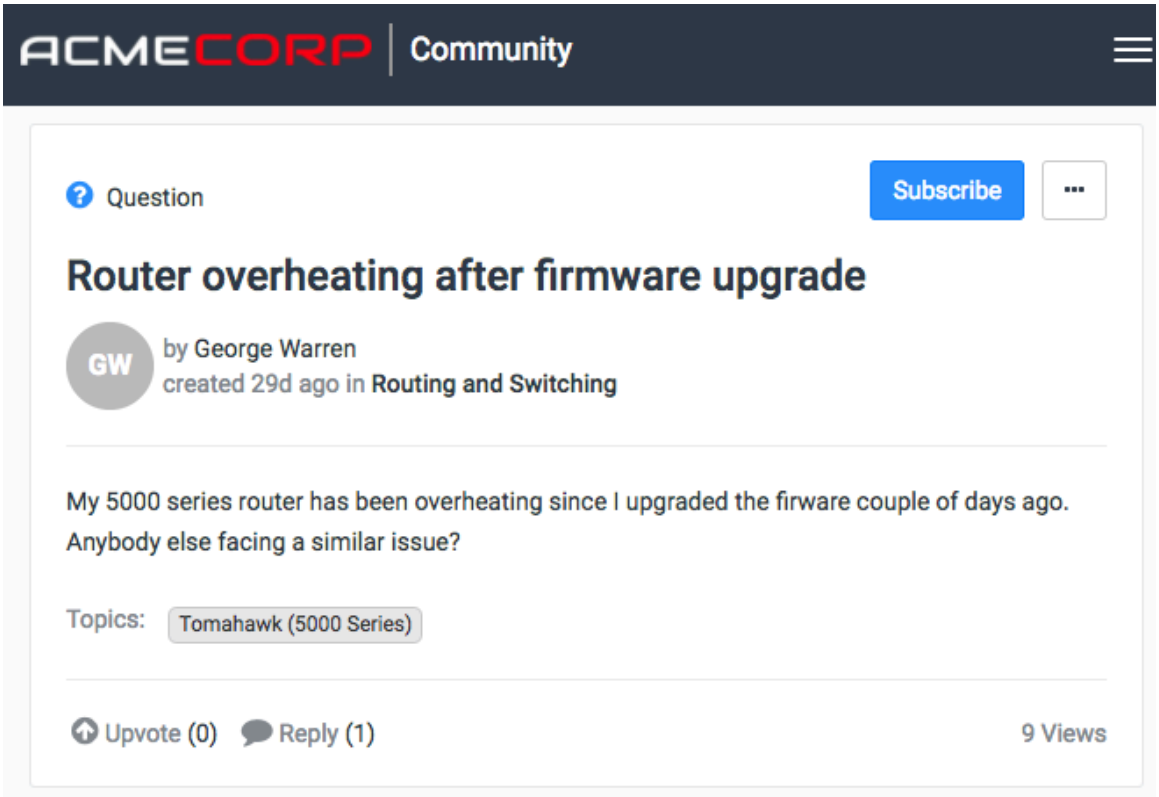


```
<!DOCTYPE html><html lang="en" ng-app="sn.$sp"
 ng-init="portal_id =
'5b49418bdb4aa200b1f6f78eaf96195f'" style="height: 100%"
 class="page-
{{page.sys_id}} v{{page.sys_id}}"
 data-page-id="{{page.sys_id}}"><head sp-
metatags=""><title>Routing and Switching - Router overheating
 after firmware
upgrade - Community</title><meta http-equiv="X-UA-Compatible"
 content="IE=edge;
IE=10"></meta><meta name="viewport" content="width=device-width,
 initial-
scale=1.0, maximum-scale=1.0, user-scalable=no"></meta><meta
 name="apple-
mobile-web-app-capable" content="yes"></meta><meta
 http-equiv="cache-control"
content="public"></meta><meta http-equiv="cache-control"
 content="no-cache">
</meta><meta http-equiv="cache-control"
 content="max-age=0"></meta><meta http-
equiv="pragma" content="no-cache"</meta><meta name="description"
content=Routing and Switching - Tomahawk (5000 Series) - My 5000
 series router
has been overheating since I upgraded the firmware couple of
 days ago. Anybody"
custom-tag=""></meta><link href="favicon.ico?v=4" rel="shortcut
 icon"></link>
<link href="images/mobile/apple_touch_snc.png?v=09-26-2017_1830"
 rel="apple-
touch-icon"></link><link type="text/css" rel="stylesheet"
```

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```
href="/styles/css_includes_$sp.cssx?v=09-26-2017_1830"></link><l
ink
href="styles/scss/sp-bootstrap.scss?
portal_id=5b49418bdb4aa200b1f6f78eaf96195f&amp;v=21989c86db6dc30
0b14a75921f9619
d9" rel="stylesheet" type="text/css"></link><link
 rel="stylesheet"
type="text/css"
 href="styles/sp-patch.css?v=21989c86db6dc300b14a75921f9619d9">
</link><link href="/styles/scss/csm-styles.scss?
portal_id=5b49418bdb4aa200b1f6f78eaf96195f&amp;v=7d88d886db6dc30
0b14a75921f9619
71" type="text/css" rel="stylesheet"></link><link
 type="text/css"
rel="stylesheet"
 href="/scripts/icon-fonts/font-awesome/css/font-awesome.cssx?
v=09-26-2017_1830"></link><script data-description=NOW session,
 user_name,
etc">window.NOW = window.NOW || {};
      //record watch / presence
      window.NOW.session_id =
 '302E95AADBA14700B14A75921F9619A0' ;
      window.NOW.user_name = xxxxxxx
      window.NOW.user_id = '6816f79cc0a8016401c5a33be04be441' ;
```

The *description* meta tag text is made up of three data fields that are taken from the *communitiy_question* record. In the tag, the values are separated by a hyphen character.

- The first portion of the *description* meta tag is the value of the `forum name` field in the question record. In the example, the forum name is `Routing and Switching`.
- The second portion of the tag is the value of the `topic` field in the record — `Tomahawk (5000 Series)` in the example.
- The third portion of the tag is generated from the first 100 characters of the `body` field in the record — `My 5000 series router has been overheating since I upgraded the firware couple of days ago. Anybody`.

In addition to the *description* meta tag for a question page, the Communities application injects a *title* tag (highlighted in blue). The title is generated dynamically using two values from the *communitiy_question* record:

- Forum name (`Routing and Switching` in the example)
- Short description (`Router overheating after firmware upgrade` in the example)

Procedure

1. Navigate to **All** > **Service Portal** > **Pages**.
2. In the list of portal pages, click the **ID** of the page to update (in the example, *community_question*).

   See the list of pages in Communities that support SEO data.

3. On the Page form:

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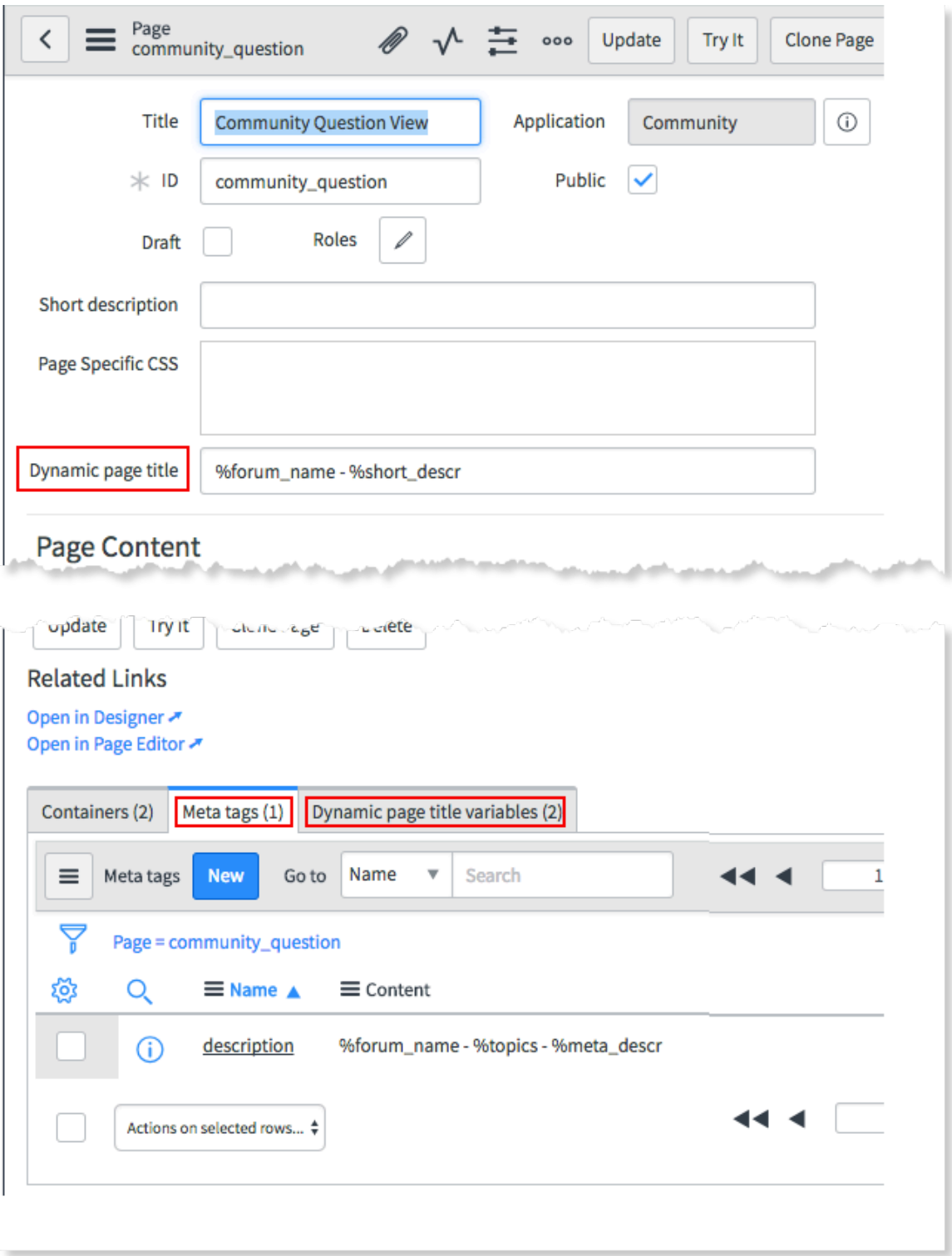
- Modify or add meta tags in the **Meta tags** related list.
- Modify the **Dynamic page title** by modifying the structure of the title text or by modifying or replacing the variables that generate the text. The variable definitions appear in the **Dynamic page variables** related list.



Using communities

Participate in your community by sharing content, asking and answering questions, creating events, giving feedback, and so on.

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Community homepage features for logged in users

Your community activity usually begins on the community homepage. If you are a logged in user, you see different information than non-logged in users. Your organization can customize the homepage.

Important:

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Note: The Community Service Portal header menu is not enabled by default. For more information, see Configure Community Service Portal header menus.

From the community homepage, you can access and use the following features:

Community homepage for logged in users

UI component	Description
Announcements	View announcements targeted to the entire community.
Community menu	Navigate to all forums and all topics and other quick links.
Tours	View a tour for additional guidance on how the Communities application works. Tours appear when your administrator creates them on certain pages.
Profile photo	Click your profile photo to either view your community profile or logout.
Search	Enter a search term. You can enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Browse Forums	Click the + icon to view up to eight available forums. Click **View all Forums** to go to the Forums list page and search for the forum you require. If sub forums exist, they are listed on the parent forum tile along with a count of how many there are. Click the link to access a list of the sub forums.
Have a question? Click here to start typing and Post Content	Contribute to the community by posting a question. Click Question, Blog, Video, Document, or Event to add your content and assign it to a forum.
Featured Content	View featured community content.
Question filters	Filter by question to view solved, unsolved, and unreplied questions. **Note:** The content options are displayed according to the permissions you are assigned in the forum.

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Community homepage for logged in users (continued)

UI component	Description
Content List and Activity Feed	Toggle between the Content List and Activity Feed. You can filter according to content type, forum, most recent or popular, and when the content was created. • Content List: Lists all content added to the community. Displays when updates were made to replies, comments, and answers marked as correct and which user made the updates. **Note:** ○ Updates are not displayed for new or existing comments or replies due for moderation. ○ Updates are displayed for approved changes made to comments or replies as a result of moderation. • Activity Feed: Lists all activity in the community based on your posts and subscriptions. **Note:** ○ All activities per content item are grouped. Only the most recent activity is listed per content item. For example, an upvote to a question. ○ To view all activity associated with a content item, click the content item. All activities, regardless of your subscriptions, are displayed.

Navigating the activity feed

The activity feed provides a central place for community users to view information and interact. It lists the most recent activity in the community based on your network, posts, and subscriptions. You can reply, comment, and give feedback directly from the activity feed.

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Activity feed

UI component	Description
Levels	View the most recent levels you have earned in the community as a result of points accumulated. You can also view the most recent badge you have earned for your achievements or areas of expertise within the community.
Content added by	View the most recent contributions by another user that you are following or content that you have subscribed to.

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Activity feed (continued)

UI component	Description
another user	
Content added by you	View the most recent content that you created in the community.
Feedback	Provide feedback on content that you find useful. There are four supported types of content feedback: comment, upvote, helpful, and mark as correct answer.
Reply	Reply to a question or another reply.

Navigating the forum homepage

While in a forum, you can navigate the forum homepage and perform tasks, such as posting content.

Important:

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Forum homepage

UI component	Description
Forum name and description	Displays the name and description of the forum. Click **Show more** to read more of the description.
Subscribe	Subscribe to content in the community.
Sub Forums	If sub forums exist, they are listed. Click a link to access a sub forum. If more than three sub forums exist, click **View all** to view the list of all sub forums and click the one you want to access.
Search Forum	Type a keyword and click the Search icon to view the matching content within a forum.
Have a question? Click here to start typing	Contribute to the community by posting a question.
Question filter	Filter by question to view solved, unsolved, and unreplied questions.
Content List	Lists all content added to the community. Displays when updates were made to replies, comments, and answers marked as correct and which user made the updates. Filter according to content type or sort by most recent or popular, and when the content was created.

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Forum homepage (continued)

UI component	Description
	Note: • Updates are not displayed for new or existing comments or replies due for moderation. • Updates are displayed for approved changes made to comments or replies as a result of moderation.
Post Content	Click Question, Blog, Video, Document, or Event to add your content and assign it to a forum. **Note:** The content options are displayed according to the permissions you are assigned in the forum.
Announcements	View forum-specific announcements.
Topics	Click a topic to navigate to a particular topic.
Leaderboard	View the leaderboard to find community experts for the forum.
Most viewed content	Displays the top three posts according to number of views.

Community homepage features for non-logged in users

Your community activity usually begins on the Community homepage. If you are a non-logged in user, you see different information than logged in users. Your organization can customize the homepage.

Important:

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Community homepage for non-logged in users

UI component	Description
Community announcement	View announcements targeted to the entire community.
Community menu	Navigate to all forums, all topics, and other quick links.
Sign up/Login	Sign up or log in to the community.
Search	Enter a search term. You can enter a keyword to use the type-ahead search or enter one or more words to view all search results.
Browse community forums	Click the + icon to view up to eight available forums. Click **View all Forums** to go to the Forums list page and search for the forum you require.

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Community homepage for non-logged in users (continued)

UI component	Description
	If sub forums exist, they are listed. Click a link to access a sub forum. If more than three sub forums exist, click **View all** to view the list of all sub forums and click the one you want to access.
Question filter	Filter by question to view solved, unsolved, and unreplied questions.
Content List	View content posted in public forums in the community. Filter according to content type or sort by most recent or popular, and when the content was created.
Why Join?	View some of the advantages of joining the community.
View Leaderboard	View the leaderboard to find community experts on specific forums or topics.
Ask a Question	Click **Ask a Question** and a message appears indicating that you must be a logged-in user to perform this action. You can **Login/Sign Up** directly from here.
Topics	Click a topic to navigate to a particular topic.
Show More	View an expanded list of content available in the community.

Self-register to a community

Once you have accessed a public forum and decided to join the community, you can self-register by signing up and accepting the community Terms and Conditions.

Before you begin

Role required: none

Important:

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About this task

Every community user has to have a community account. Existing users who access a community for the first time have to accept the Terms and Conditions. An account is created once the Terms and Conditions have been accepted. New users sign up to the community and accept the Terms and Conditions.

If the community Terms and Conditions are updated, all community users are prompted to review and accept them when they log in the next time.

Procedure

1. If you are a new user, navigate to the community homepage.

   a. Click **Sign up/Login**.
   The **Sign Up** screen opens.

   b. Fill out the fields on the **Sign Up** form.

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Sign Up form

Field	Description
Email address	The email address to send the email validation to.
Username	A user name for your account.
First Name	Your first name.
Last Name	Your last name.
Phone Number	Your phone number.
Password	A password for your account.
Confirm Password	A confirmation of your password.
I agree to the Community Terms and Conditions	A check box to agree to the community Terms and Conditions.

c. Click **Sign Up**.
An email is sent to the email address you entered.

d. Open the email and click the validation link.

e. Click the **Click here to login** message.

f. Log in with your user name and password.
The **Welcome** pop-up opens.

g. Confirm your time zone.

h. Click **User Profile** or **Notification Preferences** to edit your community profile or your notification and subscription settings.

2. If you are an existing user, but visiting the community for the first time, click any community page.

a. If required, change your **Display Name** on the **Setting up your account** pop-up.

b. Select the check box to agree to the community Terms and Conditions.
The **Welcome** pop-up opens.

c. Confirm your time zone.

d. Click **User Profile** or **Notification Preferences** to edit your community profile or your notification and subscription settings.

Search the community

Enter a keyword to use the type-ahead search on the Community homepage or enter one or more words to view all search results.

Before you begin

Role required: sn_communities.community_user

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Procedure

1. Navigate to the community homepage.
2. Press the space bar to use the type-ahead search and enter a keyword in the **Search Community** field.
3. Choose from the following options:
   a. Click a content item, topic, forum, or profile that matches your search.
   b. To enter your question, blog, or video if no matching content is displayed, click **Ask the Community**.
   c. To display all search results, click **View all Results**.
4. Alternatively, enter one or more keywords in the **Search Community** field and press the Enter key.
   A list of matching search results appears.

Refine your search results

Refine your search results to narrow down the content displayed.

Before you begin

Role required: sn_communities.community_user

Important:

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Procedure

1. Navigate to the community homepage.
2. Enter a keyword in the **Search** field.
3. From the **Refine Results** panel, choose from the following options.
   - To filter and customize your search results, click any option under **Types**. For example, click Profile to view the profiles that matches with the search keyword. The details of the profile such as display name, gamification information-points and badges, bio, user title and company appear. To reverse this action, click the **x** icon of the corresponding item. To remove all filters, click **Clear All**.
   - Select any item from the **Forums**, **Topics**, or **Authors** fields to filter by forum, sub forum, topic, or author. You can add multiple forums, sub forums, topics, and authors and click anywhere on the screen to display the results.
   - To filter by the time period that the content was posted, click any **Last Updated** item.
   - Click the **–** icon of any category to collapse the category and save space. Click the **+** icon to restore a collapsed category.

   The search results page displays content based on the filter criteria.

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Sort your search results

Sort your community search results to narrow down the content displayed.

Before you begin

Role required: sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

The search results are sorted according to **Relevance** by default.

Procedure

1. Navigate to the community homepage.
2. Enter a keyword in the **Search** field.
3. To display the most recent results, click **Sort By: Newest**.
   The results are displayed in descending order.
4. To display the results in ascending order, click **Newest**.

Use a community profile

The community profile displays an overview of a user's personal information as well as their contributions, network, achievements, expertise, and events they are attending. You can view and edit your own profile. You can also view another user's profile and perform actions, such as following them or reporting inappropriate content.

Before you begin

Role required: sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

Perform one or more of the following tasks from the community profile.

Manage your community profile

View and edit your own community profile, which displays your contributions, network, achievements, expertise, and events you are attending.

Before you begin

Role required: sn_communities.community_user

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Important:

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About this task

There are two ways of accessing your community profile.

Procedure

1. From the Community homepage, perform one of the following actions.
   - Click the **Community** menu and then **Community Profile**.
   - Click your name or profile photo and then **Profile**.
2. View the sections on your community profile.

Community profile

Section	Description
Profile header	An overview of your personal information. ○ Click **Edit Profile** to change your profile photo and edit your personal information. ○ Click **Edit Profile** to change your user preferences. Update your time zone to view when events are occurring in your selected time zone. ○ Click the **...** icon and then **Display Settings** to set your display settings and determine who can view which sections of your profile. If the gamification feature is enabled, the profile header includes your current gamification achievements, including: ○ The top three badges that you have been awarded ○ The total number of points that you have earned ○ The current level that you have achieved based on your point total (for example, Enthusiast or Champion)
Content tab	An overview of the published and draft content you have created and the content you have bookmarked. ○ **Authored**: Content you contributed. You can select the content type and the forum, and sort by state. ○ **Drafts**: Content you contributed that is in draft state. You can select the content type and the forum. Open a draft to publish it.

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Section	Description
	Note: You can only save content in draft for blogs and events. ○ **Bookmarks**: Content that you have bookmarked. You can select the content type, the forum, and sort by recent or oldest. You can also remove bookmarks.
Activity tab	The most recent actions performed by you in the community, for example, commenting on a post or providing feedback.
Network tab	A record of your network in the community. ○ **Followers**: The users that are following you. ○ **Following**: The users that you are following. ○ Click **Follow** to start following a user, who is following you. ○ Point to **Following** and click **Unfollow** to stop following a user.
Achievements tab	An overview of your gamification achievements. ○ **Levels**: A list of the available levels that you can achieve, including the starting point value, with your current level highlighted in blue. ○ **Badges**: A list of the badges that you have been awarded as well as available badges. Awarded badges appear at the top of the list and available badges appear below. You can filter this list to view awarded badges or all badges. ○ **Points**: A history of the points that you have earned and the activities performed that earned the points. This information also includes the forum in which the activity was performed. This list includes your last 50 activities. Click **Show more** to display additional pages.
Events tab	A list of events that you created, are attending, or past events you have attended. Click an event to view the event details.
Contributions	The number of your content and feedback contributions to the community.
Forum Expertise	A display of your expertise at forum level. You can view your level within the forum and the number of points you have gained through contributing to that forum. Click the information icon to view the point ranges required to reach each forum level.

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Section	Description
Topic Expertise	A display of your expertise at topic level. You can view your level within the topic and the number of points you have gained through contributing to that topic. Click the information icon to view the point ranges required to reach each topic level.

View another user's community profile

View another user's community profile to see their contributions, network, expertise, and so on. You can also manage your network by following and unfollowing other community users.

Before you begin

Role required: sn_communities.community_user or sn_communities.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Click the user's name or profile photo for the community profile that you want to view.
2. View the sections of the user's community profile.

Community profile

Section	Description
Profile header	The sections of the community profile that the user has made visible. ○ To start following the user, click **Follow**. ○ To report any inappropriate content on the user's community profile, click the **...** icon and then **Report Profile**. ○ To assign a user points for a specific contribution to the community as a community administrator, click the **...** icon and then click **Assign Points**. ○ To hide content from the community until it is corrected as a community administrator, click **Display Settings** You can also click **Ban User** to ban a user from creating or editing content.
Content	○ **Authored**: Content that the user contributed. ○ **Featured**: Content the user posted that has been featured. ○ **Drafts**: Content the user contributed that is in draft state.

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Section	Description
	Note: Only community administrators can view draft content of another user. ○ **Bookmarks**: Content that the user has bookmarked.
Activity	The most recent actions performed by the user in the community, for example, commenting on a post or providing feedback.
Network	○ **Followers**: The users that are following the user's community profile. ○ **Following**: The users that the community profile user is following. ○ You can manage your own network from another user's profile. To start following a user, click **Follow**. To stop following a user, point to **Following** and click **Unfollow**.
Achievements	An overview of the user's gamification achievements. ○ **Levels**: A list of the available levels that the user can achieve, including the starting point value, with the user's current level highlighted in blue. ○ **Badges**: A list of the badges that have been awarded to this user. ○ **Points**: A history of the points that this user has earned and the activities performed that earned the points. If the user has earned points in a forum that you do not have access to, the name of the forum is replaced with **Private forum**.
Events	A list of events that the user has created, is attending, or past events that the user has attended. Click an event to view the event details and respond.
Forum Expertise	A display of the user's expertise at the forum level. You can view their level within the forum and the number of points they have gained through contributing to that forum. To view the point ranges required to reach each forum level, click the information icon.
Topic Expertise	A display of the user's expertise at the topic level. You can view their level within the topic and the number of points they have gained through contributing to that topic. To view the

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Section	Description
	point ranges required to reach each forum level, click the information icon.
Contributions	The contributions the user has made to the community.

Follow a community user

Manage your network by following other community users and tracking their activity in the community.

Before you begin

Role required: sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

There are several ways of following users in the community.

Procedure

1. From the Communities homepage, perform one of the following actions.
   - Click your profile name or photo.
   - Click your profile name or photo and then the **Network** tab.
   - Click another user's profile name or photo and then the **Network** tab.
2. Click **Follow** for every user you want to follow.
   The state changes to **Following**. Your Activity Feed is updated with the activity those users have taken in the community.
3. **Optional:** Point to **Following** and click **Unfollow** to stop following a user.

Edit your community profile photo and personal information

Change your community profile photo and edit your personal information.

Before you begin

Role required: sn_communities.community_user

You can only edit your community profile if you are logged in to the community.

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. From the Community homepage, select your name or profile photo and then select **Profile**.
2. To change your profile picture, click **Upload Picture**.

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A file system upload is initiated. Choose an image in `.png` or `.jpg` format and click **Open**.

3. To change any field value, select the value to display a pop-up window.
4. In the field value pop-up window, select the desired value and click **Save**.

The following table includes a description of the fields on the User Profile page.

User Profile fields

Field	Description
Company	Name of your employer.
Title	Your job title.
Department	Your job department.
Location	Your address, city, and state.
Bio	A short description about yourself.
Email	Your email address. **Note:** Use the email address used in your instance profile or the reset password features cannot be used.
Business phone	The work telephone number where people can reach you.
Mobile phone	Your mobile telephone number.
Language	Your preferred language.
Time zone	The time zone in which you work or reside.
Accessibility enabled	Use this toggle button to enable accessibility features.

Edit your community profile display settings

Edit your display settings to determine who can view each profile section.

Before you begin

Role required: sn_communities.community_user, sn_communities.admin or sn_communities.moderation_admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

You can edit your own display settings for your community profile. If a community administrator finds inappropriate content on your profile, they can edit your display settings to hide the content from the community until it is corrected.

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Procedure

1. On the community homepage, click the **Community** menu and then click **Community Profile**.
2. Click the **...** icon and then click **Display Settings**.
3. Open the choice lists and select display settings for any section.
4. Choose the privacy level to apply.

Privacy levels

Privacy level	Description
Everyone	Visible to all users, including non-logged in users.
Only me	Visible to yourself and administrators. If an administrator finds inappropriate content on your profile, the administrator can change the display settings to **Only me** until the content is modified. You receive an email notification detailing the display settings that were modified for which sections. Update the content and adjust the display settings accordingly.
Everyone after logging in	Visible to all users who access the community after logging in.
Followers	Visible to users who are following your profile.

5. Click **Save Settings**.

Report a community profile

Report a community profile to alert community moderators that there is offensive or inaccurate information in the profile.

Before you begin

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Click the name or photo of the user to report.
2. Click the **...** icon and select **Report Profile**.
3. From the list, select the reason you are reporting the user and add **Additional Comments**.
4. Click **Submit**.

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- A confirmation message indicating that the abuse report has been received and will be reviewed is displayed.
- A moderation task is created and assigned to a moderator for resolution.

Community subscriptions

Using subscriptions, you can choose specific areas of interest. Your activity feed and notifications are personalized according to your subscriptions.

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Subscription types

Subscription type	Description/Features
Subscription	• Subscribe or unsubscribe to forums, topics, and community content (questions, answers, blogs, and video). • Auto-subscribe: Whenever you post content, you are automatically subscribed to the content itself. You are also automatically subscribed when you post a reply or a comment.
Activity feed	Displays activities based on your subscriptions with the most recent at the top.
Notification settings	• Manage your subscriptions using **Notification Settings**. • For each of your subscriptions, set email notifications using **Notification Preferences**.

Subscribe to content

Subscribe to forums, topics, questions, blogs, and videos. You are automatically subscribed to content that you create.

Before you begin

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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Procedure

1. To find the content of interest, use the search field or navigation to find the content of interest, such as a forum, topic blog, or video.
2. On the content page, click **Subscribe**.
   - A confirmation message indicating that you have successfully subscribed to the content is displayed at the top of the screen.
   - You receive a notification whenever there is an update to this content, for example, an answer to a question or a comment on a blog entry.
   - You can view updates in your activity feed.
3. **Optional:** To remove a subscription, return to the content and click **Subscribed**. When you point to this option, it becomes **Unsubscribed**.

   You can also view your notifications and subscriptions and enable or disable them. For details, see Set notification preferences.

Related topics

Set notification preferences

Community subscriptions

Set notification preferences

Set notification preferences to receive updates via email on the content that you are following.

Before you begin

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

The Communities application separates the notion of subscriptions from notifications. It is possible to subscribe to an item and disable notifications. You can also turn off all notifications.

Procedure

1. Select **Community** > **Notification Settings** from the header.
2. Click **Notifications and Subscriptions**.
3. Choose your category, such as **Forums**, **Topics**, **Blogs**, or **Videos**, to manage your notifications in those areas.
4. In the **Email** column, toggle any item that should or should not send updates.
5. **Optional:** To turn all notifications on or off, toggle **All Notifications**.

Note:

Activity subscription modules will not be displayed in the **Navigations and Subscriptions** page, when you enable the disable_notifications flag.

The isNotificationDisabled API checks the value of the disable_notifications flag. This API can also be used for blocking notification of other activity subscription modules.

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Request membership to a forum

You must be a registered member of the community to request membership to a forum that is marked for membership only.

Before you begin

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Perform either one of the following actions:
   - Navigate to **Community** > **Homepage**. Open **Browse Community Forums** and then select the forum.
   - Navigate to **Community** > **All Forums** and then select the forum in the list. If you requested membership earlier, the status of your request appears.
2. Click **Request Access**.

   If approval is required, **Status** changes to **Requested**. You receive an approval or rejection email. If approved, you are immediately subscribed to the forum and **Status** changes to **Private Member**.

   If no approval is required, the request is auto-approved and **Status** changes to **Private Member**.
3. **Optional:** To cancel a request, point to the **Requested** status and click **Cancel**.
4. **Optional:** To leave a forum, click **...** within the forum and then select **Leave Forum**. **Status** changes to **Request Access**.

Related topics

Community access types

Communities roles

Accept an invitation to join a forum

An invitation to join a forum is sent as an email message. The method that you use to accept an invitation depends on whether you are a registered community user.

Before you begin

Role required: none

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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Procedure

1. Open the email invitation and click **Join Forum**.
   - If you are a registered and logged-in community user, the forum opens.
   - If you are a registered community user but have not accepted the community Terms & Conditions, a message appears to accept the Terms & Conditions. The forum opens after you accept the Term & Conditions.
2. If the login page appears, take one of the following actions.

Option	Description
If you are a registered user and not logged in.	Enter your login credentials to access the fo rum.
If you are not a registered user.	**a.** Click **Sign Up** on the login page. **b.** Enter your email address, a user name, and a password to create a community account. **c.** The system sends a verification email. Click the verification link in the email to confirm your credentials. **d.** Reopen the email invitation and click **Join Forum**.

Forum membership is auto-approved and you are subscribed to the forum. **Status** changes to **Leave Forum**.

Post and respond to content in the community

Post and respond to content in the community to get answers or share information.

Before you begin

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

Perform one or more of the following tasks from the community homepage.

Ask a question in the community

Ask a question in a forum to get an answer from other community users.

Before you begin

Role required: sn_communities.community_user

You can only ask a question in a forum if you have been assigned the correct permissions.

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Important:

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About this task

If you ask a question, you can edit or delete it. If you created the question and reply with an answer, your answer is labeled **Author**.

There are three ways of asking questions in Communities.

Procedure

1. From the Communities homepage, perform one of the following actions.
   - Locate the forum to ask a question in, click its name, and then click **Have a question? Click here to start typing.** Type-ahead search shows related posts. Click to open a related post in another page.
   - Locate the forum to ask a question in and click **Post** > **Question**.
   - If you do not see a forum, click **Have a question? Click here to start typing.**
2. Click **Question**.
3. On the form, fill in the fields.

Ask a question form

Field	Description
Question	Your question.
Forum	Forum to add the question to. **Note:** If you created the question by clicking a forum from the Communities homepage, this forum is automatically entered in this field.
Topic (s) (optional)	Topic to add the question to. **Note:** You can repeat this previous step for as many topics as you want. If you change your mind about a particular topic, click its corresponding **x**icon.
Description	Content of the question. To insert an image, click the **Insert Image** button ( ), navigate to the `.png` or `.jpg` file, and then click **Open**. To insert a video, click the **Insert Video** button ( ), enter the video URL, and then click **Upload**.
Add attachments	To attach a file, click **Add attachments** and then drag the file into the **Attach Document** box or click the box and then navigate to the file.

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Field	Description
	○ You can add up to three attachments. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Maximum file size is 2 MB. ○ Supported file types are listed. ○ Click the X icon to delete an attached file. **Note:** Your system administrator may have set a limit on the total number of attachments allowed across the community. When you click **Add**, your attachments are added and displayed in the question. If a user attaches a file to your question, you receive an email notification. **Note:** If antivirus protection is enabled, all attachments are automatically scanned for viruses once the question is posted.

4. Click **Post**.
   - The question is added and is available to users in this forum. You are automatically subscribed to this question. When there is a reply, you receive a notification.
   - Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.
   - If you have added attachments to your question and your community administrator has enabled antivirus protection, a scan automatically runs in the background.

     Note:
     - If the scan is successful, the attachments are available to download.
     - If the scan is in process or unsuccessful, the file is unavailable for download.
     - Question authors and community administrators receive a notification that an attachment is infected.

   - Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until the infected file is removed.
   - If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

Related topics

Disable comments

Reply to a question in the community

Reply to a question or another reply.

Before you begin

You can only reply to a question or another reply in a forum or sub forum if you have been assigned the correct permissions.

Role required: sn_communities.community_user

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Procedure

1. To find the question or a reply to respond to, use search or navigation from the community homepage.
   You can also reply to a question or a reply from the activity feed on the homepage.
2. Click **Reply**.
3. Enter your reply.
4. **Optional:** If required, you can add an image to your reply.
   a. Click the Insert image-editing control.
   b. Choose your `.png` or `.jpg` format image file.
   c. Click **Open**.
5. **Optional:** If required, you can add a video to your reply.
   a. Click the **Insert Video** button ( )
   b. Enter the video URL.
   c. Click **Upload**.
6. **Optional:** You can add attachments to your post.
   a. Click **Add Attachments**.
   b. Drag your file into the **Add Attachments** box or click **Click to Upload**.
   c. Click **Add**.
   Your attachment is added and displayed in your post. If a user attaches a file to your content, you receive an email notification.

   Note:

   - You can add up to three attachments per post.
   - The maximum file size per attachment is 2 MB.
   - Your system administrator may have set a limit on the total number of attachments allowed across the community.
   - File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP
   - If antivirus protection is enabled, all attachments are automatically scanned for viruses once the reply is posted.
7. Click **Reply**.
   The reply is added below the question and any other replies. The reply is available to users in this forum.

   Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.

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> **Note:** If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

If you have added attachments to your reply and your community administrator has enabled antivirus protection, a scan automatically runs in the background.

- If the scan is successful, the attachments are available to download.
- If the scan is in process or unsuccessful, the file is unavailable for download.
- Reply authors and community administrators receive a notification that an attachment is infected.
- Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until the infected file is removed.

8. Click **Mark as Correct Answer** after reviewing the reply posted.

> **Note:** Author of the question, forum or community admin, and forum or community moderator review the post.

If an accepted solution has infected attachments, an email notification is sent to the author, admins, and or moderators who must unmark the answer as the accepted solution. Author of the answer gets a notification to update the post.

Post a blog in the community

Create a blog post and publish it immediately, schedule to publish at a specified date, or save it as a draft.

Before you begin

You can only post a blog in a forum or sub forum if you have been assigned the correct permissions in the parent forum.

Role required: sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

You can post, edit, and delete a blog. If you comment on the blog that you create, your answer is labeled as **Author**.

Procedure

1. Locate the forum to create a blog in and click its name.
2. Click **Post** and then click **Blog**.
3. On the form, fill in the fields.

Post a blog form

Field	Description
Blog Title	Title for your blog.
Forum	The forum or sub forum to add the blog to.

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Field	Description
	Note: When you create the blog by clicking a forum or sub forum from the Community homepage, the forum or sub forum name is automatically displayed in the field.
Topic (s) (optional)	Topic to add the blog to. **Note:** You can repeat this step to add as many topics as you want. To delete a particular topic, click its corresponding **x**icon.
Description	Content of the blog. To insert an image, click the **Insert Image** button ( ), navigate to the .png or .jpg file, and then click **Open**. To insert a video, click the **Insert Video** button ( ), enter the video URL, and then click **Upload**.
Add attachments	Click **Add attachments** and then drag the file into the **Attach Document** box. Alternatively, click the box and then navigate to the file. ○ You can add up to three attachments with supported file types. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Maximum file size is 2 MB. ○ Click the X icon to delete an attached file. **Note:** Your administrator may have set a limit on the total number of attachments allowed across the community. Click **Add**. If a user attaches a file to your blog, you receive an email notification. **Note:** If antivirus protection is enabled, all attachments are automatically scanned for viruses when the blog is posted.
Schedule Publish	Click the check box to publish the blog on a specified date. Select the date, time, and time zone of the blog. The scheduled blog is only visible for author and administrator until it is published. **Note:** For a blog that has approval workflow, the blog state changes to "Ready to publish" when it is approved before the scheduled time. If a blog is approved after the scheduled time, the state changes to "Published".

4. Complete one of the following actions to save your blog.

To	Do this
Save as Draft	Review and publish your blog later. The blog appears as a draft on your profile page under **Content** > **Drafts**.

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To	Do this
	Note: Community and forum administrators can edit, delete, and publish drafts. If a community or forum administrator edits, deletes, or publishes your draft, you receive an email notification. From your profile page, you have the following options. **a.** To review your blog before publishing, click **Edit**. **b.** ▪ Click the corresponding ellipsis icon and then **Publish**. ▪ Click the corresponding ellipsis icon and then **Delete**.
Schedule	Click **Schedule** to post a blog on the specified date. You can edit or disable the schedule until the blog is published. **Note:** This option appears for a blog for which **Schedule Publish** option is selected.
Post	Publish your blog directly. The forum subscribers receive an email notification. Activity and content feeds are updated accordingly. **Note:** If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator. If you have added attachments to your blog and your community administrator has enabled antivirus protection, a scan automatically runs in the background. ○ You can download the attachments only when the scan is successful. ○ Blog authors and community administrators receive a notification for an infected attachment. ○ Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until you remove the infected attachment.

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Related topics

Disable comments

Post a video in the community

Post a video in a forum or sub forum.

Before you begin

Role required: sn_communities.community_user

You can only post a video in a forum or sub forum if you have been assigned the correct permissions in the parent forum.

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

You can post videos on their own or add them to a question or a blog. If you are the creator of the video or a community administrator, forum administrator, forum moderator, or community moderator, you can edit the videos once posted.

Procedure

1. While in a forum, click **Post** > **Video**.
2. On the form, fill in the fields.

Post a video form

Field	Description
Click here to Insert a Video	○ URL of your video. ○ Click **Upload**. The video is added to your post. ○ To edit and replace the current video with another one, click **Select a different Video**.
Video Title	Title for the video.
Forum	Read-only. The forum or sub forum is automatically entered in this field.
Topic (s) (optional)	Topic to add the video to. **Note:** You can repeat this step for as many topics as you want. If you change your mind about a particular topic, click its corresponding **x**icon.
Description (optional)	Description for your video.

3. Click **Post**.

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4. **Optional:** If you have permission to edit or delete the video, click a video, click the corresponding ••• icon, and then click **Edit** or **Delete**.
   Once a video is uploaded, other community users can comment on it, give feedback, subscribe to the video, bookmark it, and report any inappropriate content in the video.

Related topics

Disable comments

Comment on a blog or a video in the community

Comment on a blog or a video or comment on another comment.

Before you begin

You can only comment in a forum or sub forum if you have been assigned the correct permissions in the parent forum.

Role required: sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

If you create a comment, you can edit or delete it. If you created the blog or video and add a comment, your comments are labeled **Author**

.

Procedure

1. To find the blog or video entry to comment on, use the search field or navigation.
2. Click **Comment**, and enter your answer.
3. You can add attachments to your post.
   a. Click **Add Attachments**.
   b. Drag your file into the **Add Attachments** box or **Click to Upload**.
   c. Click **Add**.

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Your attachment is added and displayed in your post. If a user attaches a file to your comment, you receive an email notification.

Note:

- You can add up to three attachments per post.
- The maximum file size per attachment is 2 MB.
- Your system administrator may have set a limit on the total number of attachments allowed across the community.
- File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP.
- If the attachment size is large or you have a slow connection, a progress indicator is displayed.
- If antivirus protection is enabled, all attachments are automatically scanned for viruses once the reply is posted.

4. Click **Comment**.
   The comment is added below the blog or video entry and any other comments. The answer is available to users in this forum.

   Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.

   Note: If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

   If you have added attachments to your comment and your community administrator has enabled antivirus protection, a scan automatically runs in the background.

   - If the scan is successful, the attachments are available to download.
   - If the scan is in process or unsuccessful, the file is unavailable for download.
   - Comment authors and community administrators receive a notification that an attachment is infected.
   - Click **Edit** to remove the infected file and upload the attachment again. You cannot add any more attachments until the infected file is removed.

Post a document in the community

If you have the proper permissions in a forum, you can share a document with colleagues, experts, or other community users. You can associate the document with as many topics as needed.

Before you begin

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

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Procedure

1. While in a forum, click **Post** > **Document** and then fill in the form:

Document configuration form	
Document title	Enter a descriptive title for the document.
Forum	Read-only. The current forum or sub forum is selected.
Topics	Select a topic from the list. Repeat for as many topics as needed.
Attach document	To attach a file, drag the file into the **Attach Document** box or click the box and then navigate to the file. ○ You can attach only one document. ○ Maximum file size is 5 MB. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Click the X to delete an attached file. **Note:** Your administrator may have set a limit on the total number of attachments allowed across the community. If antivirus protection is enabled, all attachments are automatically scanned for viruses when you click **Post**.
Description	Enter a useful description for the document.

2. Click **Post**.
   - The document appears in the forum. The author of a document can edit or delete the post.
   - Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly.

   Note: If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

   If your community administrator has enabled antivirus protection, a scan automatically runs in the background.

   Note:
   - You can download the attachments only when the scan is successful.
   - The user who posted the document and community administrators receive a notification that an attachment is infected.

Related topics

Disable comments

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Mention a user in the community

Draw attention to your content in the community by mentioning other community users in the post.

Before you begin

Role required: sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

About this task

You can mention users in questions, blogs, events, comments, and answers.

Note: The user mentions feature is not enabled for document or video content types.

You can mention users in Communities in the following ways.

Procedure

1. From the community, perform one of the following actions.
   - Post content to the community and place your cursor in the script editor.
   - Click the content you want to comment on or reply to.
2. Enter the @ symbol followed by the user's name.

   Note: You can mention multiple community users in the post.

   An email notification is sent to the community users you selected and their followers. any community users that follow the user. The activity feed is also updated.

   Note: Followers can set their notification preferences to enable or disable notifications of user mentions.

Community events

Create, manage, and participate in events to encourage engagement across the community.

Before you begin

Role required: sn_communities.admin or sn_communities.community_user

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

Perform one or more of the following tasks.

Post a community event

You can create a community event that other community users, colleagues, or experts can register for and attend.

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Before you begin

You must have permission to create events (**Event Write and Comment Write**) and be a member of the forum to create the event in. The **Event** content type must be active in the forum for the event.

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. While in a forum, click **Post** > **Event** and then fill in the form.

Create an event

Field	Description
Event title	A title for your event.
Forum	Read-only. The forum is automatically entered in this field.
Topic(s) optional	A topic to add the event to. **Note:** You can add as many topics as needed. To remove a topic, click the **x**.
Set guest limit / Total allowed	Select the check box to specify the maximum number of guests that can attend in the **Total allowed** field. When the number of guests reaches to the limit, additional users are added to the wait list.
Display guest list to the public	Select the check box to enable forum members to view the guest list for the event.
This is an online event	For an online event, click the check box.
Name of location	For an online event, the text specified in the **Name of Location** appears as a label with a hyperlink to the specified **Web URL**. For example, enter the text as 'Click Here to Join the meeting' to facilitate your subscribers to join the meeting. For an offline event, enter the **Name of location**, **Address**, **City**,**State**, **Zip/ Postal Code**, and **Country** to mention the venue.
Web URL	Enter the Web URL of an online event for your subscribers to click and join.
Date and time	The date and time of the event. **Date** must be in the future. **Note:** If you change the **Duration**, the **End Time** is auto-updated. Click **Change time zone** to set the time zone for the event. Default: Your local time zone. The time zone changes according to the time zone of the user viewing the event.

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Field	Description
Duration	The duration of the event. **Note:** If you change the **End Time**, the **Duration** is auto-updated. By default, the duration is 30 minutes
Send reminder to guests one day before the event	Select the check box to send an email reminder one day before the event to all users that responded **Attend**.
Description	The description of the event. To insert an image, click the **Insert Image** button ( ), navigate to the .png or .jpg file, and then click **Open**. To insert a video, click the **Insert Video** button ( ), enter the video URL, and then click **Upload**.
Add attachments	Click **Add attachments** and drag the file into the **Attach Document** box or click the box and then navigate to the file. ○ You can add up to three attachments. ○ File types supported are PPT, PPTX, XLS, XLSX, DOC, DOCX, TXT, PDF, PNG, BMP, JPG, JPEG, GIF, ZIP. ○ Maximum file size is 2 MB. ○ Click the X icon to delete an attached file. **Note:** Your system administrator may have set a limit on the total number of attachments allowed across the community. When you click **Add**, your attachments are added and displayed in the event. If a user attaches a file to your event, you receive an email notification.
Schedule Publish	Click the check box to publish an event on a specified date. Select the date and time of the event. By default, the schedule time zone is same as event time zone. The scheduled event is only visible for author and administrator until it is published. **Note:** For an event that has approval workflow, the event state changes to "Ready to publish" when it is approved before the scheduled time. If an event is approved after the scheduled time, the state changes to "Published". You cannot schedule a published event.

2. Perform one of the following actions.

To	Do this
Save as Draft	Click **Save as Draft** to save the event as a draft on your profile page under **Content** > **Drafts**.

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To	Do this
	Note: Community and forum admins can edit and publish drafts. If a community or forum admin edits, deletes, or publishes the draft, you receive an email notification. From your profile page, you have the following options. **a.** Click **Edit** to review the event before publishing. **b.** ▪ Click the corresponding ellipsis icon and then click **Publish**. ▪ Click the corresponding ellipsis icon and then click **Delete**.
Schedule	Click **Schedule** to publish an event on the specified date. **Note:** This option appears for an event for which **Schedule Publish** option is selected.
Publish	Click **Publish** to publish the event directly. As an author, you can edit or delete the event. Community users who are subscribed to the forum receive a notification that content has been posted. Activity and content feeds are updated accordingly. **Note:** If you are a user whose content is due to be moderated, the content is not posted until approved by a community moderator.

Related topics

Edit an event

Disable comments

Edit an event

Edit the details of past and upcoming events. By editing a past event, you can attach a document or share the meeting recording link with your event subscribers.

Before you begin

Role required: sn_communities.community_user, sn_communities.moderation_admin, sn_communities.community_moderator, sn_communities.forum_moderator, or sn_communities.forum_admin

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Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Search for an event that you want to modify.
2. Click the More Options icon (⋯) and then click **Edit**.
3. On the form, edit the fields as required.

Update Event form

Field	Description	Subscriber receives an email notification
Event title	Title for past and upcoming events.	Yes
Forum	Forum name in which the event is posted. You cannot modify the forum.	NA
Topic(s)	Topics that are associated with the event. Add or modify topics as needed. To remove a topic, click **x**.	No
Set guest limit	Option to increase the guest limit to confirm the participants on the waiting list for an upcoming event. You cannot modify the guest limit for a past event.	Yes - for a confirmed participant
Display guest list to users	Option to enable or disable the display of the guest list of an upcoming event for forum members.	No
This is an online event	Option to change the event type to online or offline for an upcoming event. You cannot change a past event.	Yes
Name of location	Name of the location for past and upcoming events. ○ For an online event, the text specified in the **Name of Location** field appears as a label with a hyperlink to the specified Web URL. For example, to share the meeting recording link of a past event, change the	Yes

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Field	Description	Subscriber receives an email notification
	text to `Download the meeting recording`. ○ For an offline event, change the **Name of location**, **Address**, **City**,**State**, **Zip/ Postal Code**, and **Country** fields to mention the venue.	
Web URL	Web URL for past and upcoming events. ○ For a past event, enter the Web URL of the meeting recording to share the link with your subscribers. ○ For an upcoming event, change the Web URL if there is a change in the system details.	Yes
Date and time	Date and time for an event. You can change the date and time to a future date for past and upcoming events. When you change the date of a past event to a future date, the past event becomes an upcoming event. You can edit all other details as applicable for an upcoming event. Click **Change time zone** to set the time zone for the event. The default is your local time zone. The time zone changes according to the time zone of the user viewing the event. **Note:** If you change the **Duration** field, the **End Time** field is auto-updated.	Yes
Duration	Duration of the event. **Note:** If you change the **End Time**, the **Duration** is auto-updated. By default, the duration is **30 minutes**.	Yes

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Field	Description	Subscriber receives an email notification
Send reminder to guests one day before the event	Option to send an email reminder one day before the event to all users that responded **Attend**. This check box only appears for upcoming events and not for past events.	No
Description	Description for past and upcoming events. You can insert an image or a video as required.	Yes
Add attachments	Attachments for past and upcoming events. Edit an attachment if required.	Yes
Schedule Publish	Option to publish an event. This check box appears only for a scheduled event and not for a published event. ○ To reschedule, change the scheduled date and time as required. By default, the schedule time zone is the same as the event time zone. Selecting this check box publishes an event directly at the scheduled date and time. ○ To delete the schedule, clear the check box.	No

4. Perform one of the following actions.

To	Do this
Save	To save the details, click **Save**.
Schedule	To publish an event on the specified date, click **Schedule**. **Note:** This option appears for a draft event that the**Schedule Publish** check box is selected for.

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To	Do this
Publish	To publish an event draft, click **Publish**. As an author, you can edit or delete the event. **Note:** If you're a user whose content is due to be moderated, the content is not posted until it's approved by a com munity moderator. For an event that has approval workflow, the event state is Re view. Other users cannot view the event until it's approved.

Related topics

Post a community event

Disable comments

View and participate in a community event

You can view details for published events and perform tasks such as responding to the event or adding it to your calendar.

Before you begin

You must be a registered member of the community and have permission to read events (**Event Read and Comment Write**) to be able to respond to events.

Role required: sn_communities.community_user

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. From the community homepage, perform one of the following actions.
   - Navigate to the Content List.
   - Navigate to the Activity Feed.
   - Navigate to a forum or topic.
   - Navigate to the community profile of another user and click the **Events** tab.
   - Click **Community** > **Events**.
2. Click an event.
   The Event details page displays the following information.

Community event details	
Event header	○ View the name of the event, who created it, and when. ○ If the event organizer chose to display the guest list to the public, you can view how many community users have responded **Attending** or **Maybe** and click the numbers to see the names.

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	○ If the guest list is private, you can view how many community users have responded **Attending** or **Maybe**, but you cannot see the names. ○ View the number of spots still available in the event or your position on the waitlist. ○ If the event is taking place in the same time zone as you set in your user preferences, the **Event time zone** is displayed. ○ If the event is taking place in a different time zone to the one that you set in your user preferences, both **Event time zone** and **Your time zone** are displayed.
Event overview	○ When and where the event is taking place. ○ Description of the event. ○ Topics associated with the event. ○ Comments on the event. ○ Number of times the event has been viewed.
Upcoming Events	Next five upcoming events.
Popular Past Events	Top five most popular past events and the number of community users that were interested in the event. Interested community users include users who either attended or were waitlisted for the event.

3. **Optional:** Click **Attending**, **Maybe**, or **Declined** to view or search the guest list and their responses.
4. **Optional:** Click **Subscribe** to subscribe to the event and receive notifications when the event is updated.
   If your response is **Attending** or **Maybe**, you are auto-subscribed to the event.
5. **Optional:** Click **Respond** to indicate whether you are attending or maybe attending the event, to decline, or to add yourself to the waitlist.
   - You can also respond to an event directly from the Activity Feed.
   - If the event is full, a message stating that you can join the waitlist is displayed. The **Attend** option replaces **Waitlist**. If you are waitlisted, your position on the waitlist is displayed. Once a position becomes available in the event, you move up in the list.

   Depending on your selection, the status changes to either **Attending**, **Maybe**, **Declined**, or **Waitlisted**. You can update your response as needed.
   - If an event creator or community admin deletes an event and you responded **Yes**, **Waitlist**, or **Maybe**, you receive an email notification based on your notification preferences.
   - If an event is updated, and you responded **Yes**, **Waitlist**, or **Maybe**, you receive an email notification based on your notification preferences.
6. **Optional:** Click **...** to perform one of the following actions.

Option	Description
Add to calendar	Downloads an .ics file that you can add to your calendar. The file includes the title and description of the event, the event location, start and end dates, the event time, and any attachments. If guests have chosen not to share details, the information is not displayed in the file.

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Option	Description
Bookmark	The event appears in your bookmarks list on your profile page. Click **Remove Bookmark** to delete a bookmark.
Report content	Click **Report content** to report inappropriate content in the event.

View the community events landing page

The Events landing page provides an overview of all events that you have access to in the community. You can filter events, view your status for the event, see how many other community users are attending an event, and so on.

Before you begin

Role required: sn_communities.community_user

Community users must have permission to view events (**Event Read**).

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Events**.
   The Events landing page displays a list of all events that you have access to and a list of the five most popular past events.
2. Filter the list for events that you created or according to attendance status, by forum, and by date.
   The list displays the following information.
   - The event creator, last update, and location.
   - Your status, if you have already responded to the event.
   - The number of community users who are interested in the event. Interested community users include users who are attending or have been waitlisted for the event.
   - The number of community users who have viewed the event.
3. Click an event to perform tasks related to the event.

Manage a community event

View additional response information on the event, edit or delete events, and download a guest list.

Before you begin

You must be a registered member of the community and have permission to read events (**Event Read and Comment Write**) to be able to respond to events.

Role required: sn_communities.community_user who created the event or sn_communities.admin.

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About this task

You can access published events from several places within the community.

Procedure

1. From the community homepage, perform one of the following actions.
   - Navigate to the Content List.
   - Navigate to the Activity Feed.
   - Navigate to a forum or a topic.
   - Navigate to another user's community profile and click the **Events** tab.
   - Click **Community** > **Events**.
2. Click an event.
   The Event details page displays the following information.

Community event details	
Event header	○ View the name of the event, who created it, and when. ○ View how many community users are attending or maybe attending. ○ View how many community users declined the event. ○ View the number of spots still available in the event or your position on the waitlist.
Event overview	○ When and where the event is taking place. ○ The description of the event. ○ The topics associated with the event. ○ Comments on the event. ○ The number of times the event has been viewed.
Upcoming Events	Shows the next five upcoming events.
Popular Past Events	Shows the top five most popular past events and the number of community users that were interested in the event. Interested community users include users who either attended or were waitlisted for the event.

3. **Optional:** Click the **...** icon.
4. You have the following options.

Option	Description
Edit	Click **Edit**. The **Update Event** page opens. An email notification is sent to all community users who responded **Yes**, **Maybe**, or **Wait list**.

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Option	Description
Delete	Click **Delete**. A warning message appears asking if you are sure that to delete the event. An email notification is sent to all community users who responded **Yes**, **Maybe**, or **Wait list**.
Add to calendar	An `.ics` file is downloaded that you can add to your calendar. The file includes the title and description of the event, the event location, start and end dates, the event time, and any attachments. If guests have chosen not to share their details, the information is not displayed in the file download.
Bookmark	The event appears in your bookmarks list on your profile page. If you have already bookmarked the event, you can click **Remove Bookmark**.
Report content	As a community admin, click **Report content** to report inappropriate content in the event.
Download Guest List	Download a `.csv` file of the guest list. View the file to see the list of community users attending the event, their RSVP status, and email address.

Bookmark community content

You can bookmark your favorite questions, blogs, videos, documents, and events. You cannot bookmark content in draft state or replies or comments.

Before you begin

Role required: sn_communities.community_user

Important:

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Procedure

1. Click the content to bookmark.
2. Click the **...** icon and then select **Bookmark**.
   The bookmarked content is added to the **Bookmarks** tab on your community profile.
3. To view your bookmarks, perform one of the following actions.
   - Navigate to your community profile and then click **Content** > **Bookmarks**.
   - Click your name or profile photo and then click **My Bookmarks**.
4. You can search for bookmarks and, if required, select a bookmark and then click **Remove Bookmark**.

Provide feedback on community content

Provide feedback on content that you find useful.

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Before you begin

Role required: sn_communities.community_user

> **Important:**
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About this task

There are four supported types of content feedback: comment, upvote, helpful, and mark as correct answer. You can enter feedback directly in the Activity Feed on the Community homepage or navigate to the content you want to provide feedback on.

Content Feedback

Content feedback	Description
Comment	Comment on blogs and videos. You can also comment on a comment. The count of comments is displayed.
Upvote	**Upvote** questions. The count of upvotes is displayed.
Helpful	Mark answers, blogs, comments, and videos as **Helpful**. The count of helpful marks is displayed.
Mark as Correct Answer	If you are a community or forum administrator, community or forum moderator, or the author of the question, you can mark one answer as **Mark as Correct Answer**. There is only one correct answer for each question. If you later mark a different answer as correct, the current answer loses this status.

Procedure

1. From the Community homepage, perform one of the following actions.
   - Click a forum and then click the content, for example, a blog or a question.
   - Use search and then click the content.
   - Navigate to the content on the homepage **Activity Feed** and provide your feedback directly from here.
2. Enter your feedback.
   The following feedback is displayed.

Feedback types included in the community content

Community homepage > **Activity Feed**	Feedback on any content that users are subscribed to.
Community homepage > **Content List**	Feedback entered by other users.

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Your **Community Profile** > **Activity** tab.	Feedback entered by you.

Note: The homepage activity feed is not automatically refreshed. If updates occur while viewing the activity feed, a **New Updates Available** message appears. You can click and view all new updates. If you are in the middle of making a comment and you click **New Updates Available**, a warning message appears asking if you want to continue.

Report inappropriate community content

Report content to alert community moderators that the content is inappropriate or spam.

Before you begin

Role required: sn_communities.community_user

Important:

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Procedure

1. Use the search field or navigation to find the content to report.
2. Click the **...** icon and then click**Report Content**.
3. From the list, select the reason you are reporting the content from the list and add **Additional Comments**.
4. Click **Submit**.
   A moderation task is created and assigned to a moderator for resolution. Depending on the moderation settings created for your community, the content may be hidden until a moderator has reviewed it.

Add featured content in a community

Add or edit featured content in a community to appear in the Featured Content section on the community homepage, forum homepage, or both.

Before you begin

Set the following properties as required.

Featured content properties

Property name	Description
sn_communities.default_featured_days	Default number of days for content to be featured. End date is calculated from the date the content is featured on.
sn_communities.max_featured_limit	Maximum amount of featured content at forum or at global level.
sn_communities.featured_global_notify_user	Send notifications to community users when content is featured on the community homepage. This property is inactive by default.

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Featured content properties (continued)

Property name	Description
	Note: Notifications are always sent to community administrators and moderators.

To send out email notifications when featured content expires, set the Featured Content Expire scheduled job to **Active**.

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.forum_admin, or sn_communities.forum_moderator

Important:

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Procedure

1. Navigate to the community homepage.
2. Click the content you want to feature.

   Note: Question and Answer content types are not enabled for featuring by default. To enable Question or Answer content types for featuring, navigate to **Community** > **Administration** > **Content Types**. Click the content type you want to enable and select the **Allow Featuring** check box. In the same way, you can also disable content types for featuring.

3. Click **...** and **Mark as featured**.
4. On the Feature Content pop-up window, select whether to feature the content on the community homepage or in a specific forum.
   A notification that content has been featured is sent out to the author of the content, community users who commented on the post, and community users who are subscribed to the post. If featured content has expired or is removed from the featured content list by another user, community and forum administrators are notified.

Email a community user

Send a private message to a community user directly from the community.

Before you begin

Role required: sn_communities.admin, sn_communities.community_moderator, sn_communities.forum_admin, or sn_communities.forum_moderator

An email client must be configured.

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About this task

Uses for private messaging can include warning a user about use of a banned word, welcoming a new user, or informing users about incorrectly placed content in a forum. You can privately message a user from any community content, a comment, the Leaderboard, or the Community Profile page.

Procedure

1. Navigate to the community homepage.
2. Point to the community user name.
3. Click **Email User**.

Note: The email opens in your local email client.

View a list of questions and create a case

View questions that can potentially be converted to cases, the community portal provides a page with a list of questions created by contacts or consumers.

Before you begin

Role required: sn_customerservice_manager, sn_customerservice_agent, sn_customerservice.consumer_agent, sn_communities.admin, or proxy_case_creator

Important:

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About this task

This page displays questions from the forums to which the user has access.

Procedure

1. From the community portal, select **Community** > **Questions to Case** to open the list of questions.
   This list includes questions that have been posted by a contact or a consumer and for which a case has not yet been created.
2. Use the filters on this page to filter the question list:
   - View questions for all forums or for the selected forum
   - View questions posted within the selected time frame: 7, 15, or 30 days
   - Sort by the most recent questions or older questions
   - Sort by the question status: all, solved, unsolved, or unreplied
3. To create a case from one of the questions in the list, select a question to open the question page.
4. Select the overflow icon (**...**) and then select **Create Case** to open a Create Case form.

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The **Create Case** action is available if a case has not yet been created from a question. Once a case has been created, this action is no longer available.

Note: The **Create Case** option is available for the question posted by an external user.

Information from the question is mapped to the fields on the case.

5. Enter any additional information in the fields on the Create Case form.
   For example, add **Description** for the case.
6. If necessary, attach a file to the case.
7. Select **Submit**.
   You are returned to the question content page. The case number appears in the question header after the case is created. The question author, the customer service agent or consumer service agent, or any user with the proxy_case_creator role can see the case number.

   The contact or consumer who posted the question can also view the case by navigating to **My Cases** on the Customer Service Portal or Consumer Service Portal.

Gamification

Encourage users to participate and contribute content in the community by providing incentives in the form of points, achievement levels, and badges.

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Use the gamification framework to:

- Configure point values associated with specific user activities.
- Define achievement levels based on earned points.
- Create and assign badges to recognize users.

Community administrators can:

- Create rules and configure points that users receive for activities on the community.
- Create tracks to logically separate points assigned in the communities into different areas.
- Create levels in the community where users can achieve expertise or a reputation and then configure level ranges within each level definition.
- Create badges to award to users for different achievements.

Community users can:

- Perform activities and accrue points.
- Achieve levels based on point totals.
- View leaderboards to find community experts on specific forums or topics.
- See their own standing within the community.
- See gamification achievements on their user profiles.

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Gamification components

The gamification feature includes several components, such as rules, levels, and tracks, that enable users to earn points and badges for community activities.

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Rules

Gamification rules allow you to configure points that users receive for activities on the community.

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Gamification includes several pre-defined rules. The gamification administrator can use these rules, modify them as needed, or create new rules. These pre-defined rules include:

- Comment marked as helpful: 5 points
- Document marked as helpful: 5 points
- Video marked as helpful: 5 points
- Blog marked as helpful: 5 points
- Answer marked as helpful: 20 points
- Document bookmarked: 20 points
- Blog bookmarked: 20 points
- Video bookmarked: 20 points
- Answer marked correct for a question: 40 points

When a user performs an activity that has a gamification rule, the user profile identified in the rule receives points. Points received through a gamification rule can be configured to accumulate toward:

- Overall points across the entire community
- Points in forums associated with the activity
- Points in topics associated with the activity
- Points in a track
- Points assigned for a combination of forums, topics, and tracks

If users revert previous activities, the points associated with these activities are removed. As an example, if a rule has been defined and a user creates a blog, they are awarded points. The points are deducted when the blog is deleted. If a rule has not been defined and a user creates a blog, no points are awarded. If the user removes it once a rule has been defined, points are deducted even though none were awarded in the first place.

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Related topics

Create a gamification rule

Tracks

Tracks provide a way to logically separate points assigned in the communities into different areas.

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Gamification includes two pre-configured tracks:

- Community Expertise
- Community Participation

While the application is configured to accumulate points by tracks, gamification does not currently display tracks in the community portal.

Related topics

Create a gamification track

Levels and level ranges

Points accumulated by community users can help them achieve different reputation levels.

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The system is pre-configured with levels where community users can earn points and achieve expertise or a reputation:

- Global: overall points accumulated across the entire community
- Forum: points accumulated in forums associated with the activity
- Topic: points accumulated in topics associated with the activity

Gamification administrators can configure level ranges within each level. These level ranges progress from a starting point value to a higher value (point ranges do not overlap) and have unique, configurable names. For example, in the Global level, a user that has earned 100–499 points is a Newbie while a user that has earned 500–999 points is an Enthusiast.

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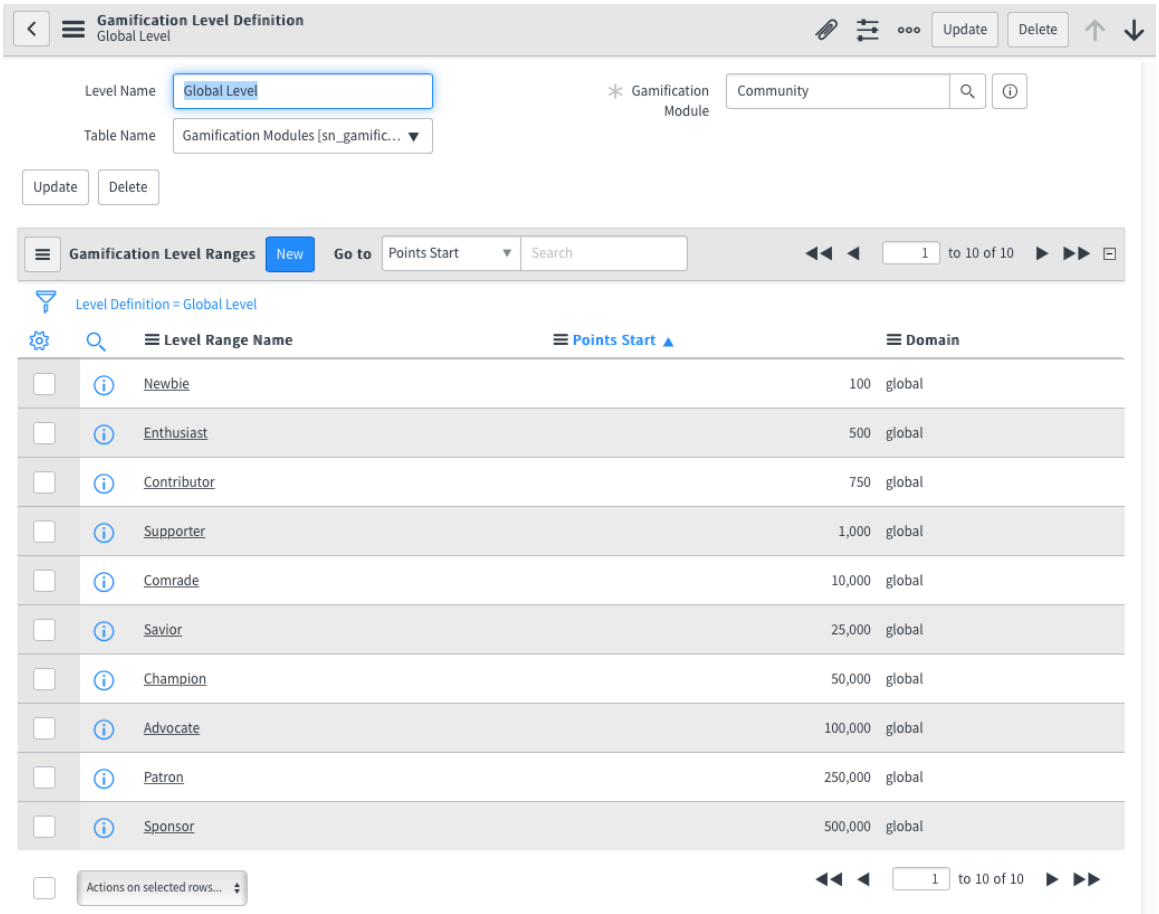
Gamification Level Definition form



In the community portal, users can see the level range names and point totals in the gamification user interface components.

- On the leaderboard page and leaderboard widgets
- At the top of a user's profile below the user name and title
- On the user profile page in the Achievements tab
- On content pages

Related topics

Manage gamification levels

Manage gamification level ranges

Badges

Users can earn badges for achievements or areas of expertise within the community. Gamification moderators manually assign badges to users.

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Gamification includes several predefined badges. Each badge includes:

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- A name
- An icon
- A brief description

Gamification administrators and moderators can award badges to community users and also remove badges. A badge can be awarded to a user one time. If a badge is removed from a user, it can be awarded to that user again.

Earned badges are visible in the community portal in the gamification user interface components. Community users can see earned badges and available badges on their own user profile page in the Achievements tab.

Related topics

Create a gamification badge

Points

Users earn gamification points by performing activities in the community.

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Users can earn points within a community, a forum, or a topic. As users accrue points, they achieve level ranges. Point totals appear on leaderboards and on user profiles, in the profile header, and in the Achievement tab. After points are awarded to a user, an entry appears at the top of the Points list and the user's point total is updated.

The Points list has a widget instance option to **Show points for private forum**.

- When set to true, the point record displayed in the user profile does not show the forum name if the user performing the action does not have forum access. It displays "Private Forum" in place of the forum name.
- When set to false, the point record does not display in the user profile.

The Points list also has a widget instance options for the **Page size**, which determines the number of results displayed in the list. If there are more results than the number specified in this option, a button to show additional results appears at the bottom of the points page.

Gamification user interface components

Gamification information appears on leaderboards, the user profile page, and content pages.

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Leaderboard page

The leaderboard page displays the top contributors in the community, in a forum, or in a topic.

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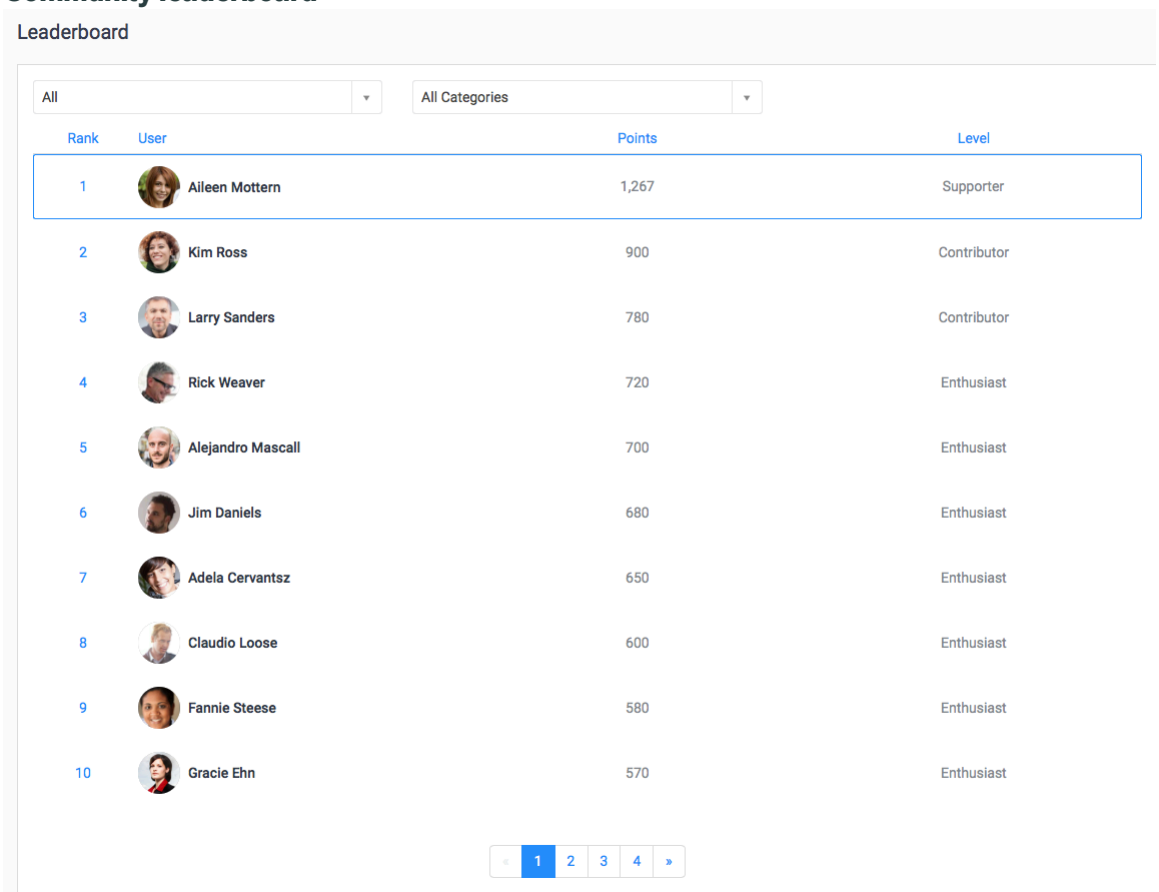
Users appear on the leaderboard based on the number of earned points and are ranked in descending order. You can filter the leaderboard to display information for the current month or all-time and by a specific forum or topic.

To display the leaderboard, navigate to **Community** > **Leaderboard**. You can also click **Show Leaderboard** on the leaderboard widget. When navigating to the leaderboard from a leaderboard widget on a forum/topic landing page, the leaderboard shows the top point earners for that forum/topic.

Community leaderboard



For each user, the leaderboard displays:

- Rank: shows the rank depending upon the selected filters (time, forum or topic)
- Name
- Profile photo (if available) or initials
- Current level: shows global, forum, or topic level depending upon the selected filter

By default, the leaderboard displays 10 users per page. Users can use the pagination controls to view additional pages. Pointing to a user name in the leaderboard displays a pop-up window with more information about the user.

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Leaderboard widgets

Leaderboard widgets appear on the Community homepage and on forum and topic landing pages. These widgets display the users with the highest point totals within the community, forum, or topic.

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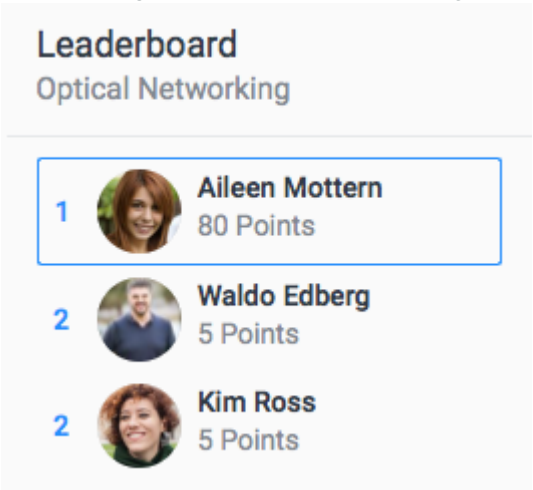
The leaderboard widget shows the top five users. If there are more than five users that have earned points within the community, forum, or topic, **Show Leaderboard** appears at the bottom. Click this button to display all of the users on the leaderboard page.

Community forum leaderboard widget



For forums and topics, the leaderboard widget header displays the forum or topic name. When navigating to the leaderboard page from a forum/topic, the leaderboard shows the top point earners for that forum/topic.

System administrators can configure settings for the leaderboard widget:

- The number of users displayed in the widget (default is 5, maximum is 10)
- The time period (overall or current month)
- The leaderboard type (community, forum, or topic)
- Anchor to a specific forum or topic (not recommended)

User profile page

The user profile page displays gamification information that showcases the user's expertise.

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The gamification information is shown in three sections of the user profile page:

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- In the header area
- In the Achievements tab
- In the forum and topic expertise widgets

User profile header area

When the gamification feature is enabled, the user profile header area includes the user's current gamification achievements. This information appears just below the user name and title:

- The top three badges that have been awarded to the user. Pointing to a badge displays the badge name.
- The total number of points earned by the user.
- The current global level achieved.

Achievements tab

Users can view details about gamification levels, badges, and points on the user profile page in the Achievements tab.

Achievement tab field and description	
Levels	A list of the levels available to the user, with the current level highlighted. This tab includes a link to the Community page **How to Earn Points**.
Badges	A list of the earned badges and available badges for the user. Earned badges appear at the top of the list. Earned badges are sorted by the most recently earned. Available badges appear below earned badges. Users can filter this list to view all badges or earned badges. When viewing another user's profile, only the earned badges are displayed and are sorted by the most recently earned.
Points	A history of the points earned and the activities performed by the user. This list includes the last 10 activities. Click **Show more** to display additional pages. Gamification moderators can award and remove points for community users. This tab includes a link to the Community page **How to Earn Points**.

Forum and topic expertise widgets

The forum and topic expertise widgets on the user profile page provide a visual representation of the user's top areas of expertise.

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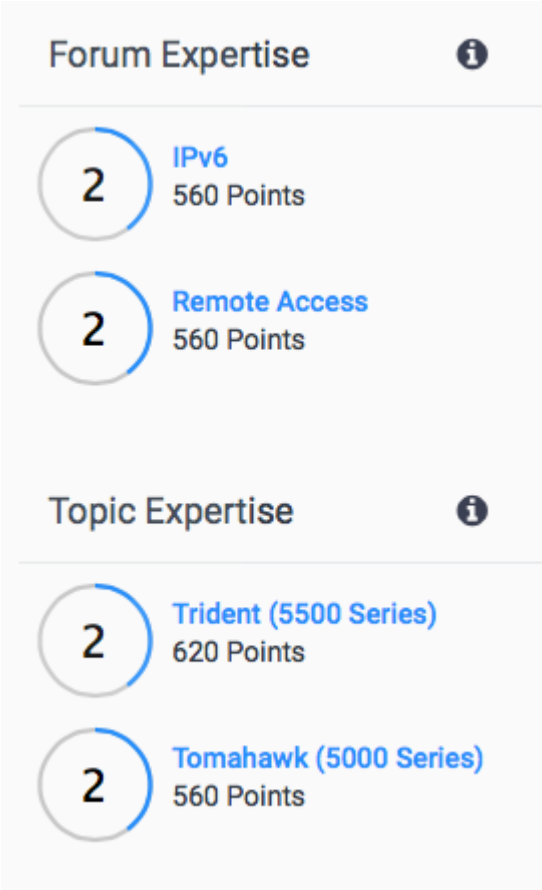
The number within the circle and the blue highlight around the circle represent the number of levels completed. For example, 2 of 5. The number below the circle indicates the total number of points that the user has earned within the forum or topic. The widget displays up to five items and the system administrator can configure the widget to show up to a maximum number of 10 items.

Clicking the info icon displays the forum or topic levels and the point ranges.

Forum and topic expertise widgets



Community content pages

The user's gamification level and badges are displayed on the content pages, so that other community users can view the reputation of the content contributor.

> **Important:**
>
> Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Pointing to a user name on content pages such as questions, blogs, and videos displays a pop-up window with gamification information including badges earned, point total, and level name. This information is available for the author or a user who has replied or commented on that content.

The community administrator can change the displayed level to show either the global level or the forum level. This display can be controlled by the sn_communities.content.show_gamification_level property.

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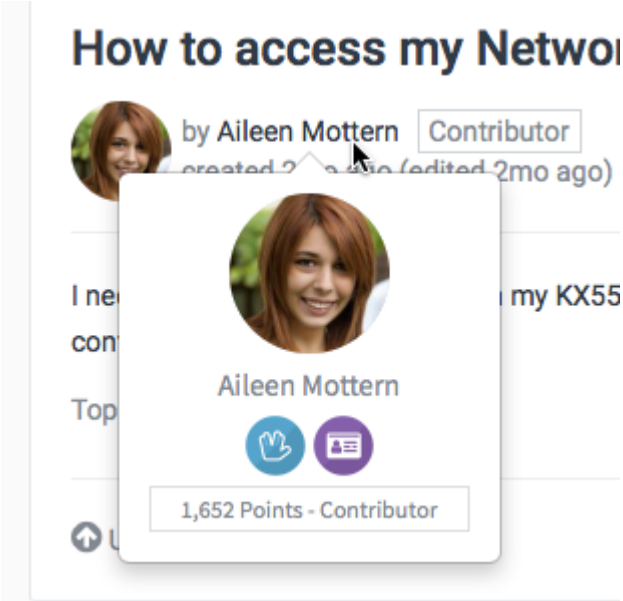
Depending upon the information available, there can be three different versions for the pop-up:

- Profile photo and name
- Profile photo and name with global points
- Profile photo and name with global points and badges

User profile pop-up window with gamification information



Gamification notifications

Community users receive notifications about badge assignments and levels achieved through the activity feed.

> **Important:**
>
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This includes global, forum, and topic levels achieved. A user, or any of their followers, are notified through an activity feed update in the following scenarios:

- When a user advances a level (global, forum, or topic)
- When a user earns a badge

How to earn points

In order to be transparent to your users about gamification rules, you can share the points received for community activities.

> **Important:**
>
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Navigate to **Community** > **How to Earn Points** for a description of the activities that users can perform to earn points. This page has links to the user's profile page. If gamification rules are modified, then this page shows the updated information.

Moderate gamification

Monitor points earned by users and award points and badges to users based on their participation within the community.

> **Important:**
>
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Award or remove points for a community user

Award points to a user to recognize their contributions to the community. Remove points for a user if you observe that they are cheating the gamification system.

Before you begin

Role required: sn_gamification.moderator

> **Important:**
>
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Procedure

1. Navigate to the Community homepage.
2. Go to **Community** > **Leaderboard**.
3. Click the name of the user on the leaderboard to open the user profile.
4. Click the profile overflow icon (**...**) and select **Assign Points**.
5. In the Assign Points pop-up window, enter the number of **Points**, a **Reason** for awarding the points, and select a **Track**.
   a. To assign points, the points entered should be a positive value such as 100.
   b. To remove points, the points entered should be a negative value such as 100.
   The maximum number of points that can be awarded or removed at one time is 1000.
6. Click **Assign Points**.
   An entry for the point assignment activity shows at the top of the Points list and the user's point total is updated.

Award a badge to a user

Award gamification badges to community users to recognize their community activities.

Before you begin

Role required: sn_gamification.moderator, sn_gamification.admin

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Important:

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About this task

A badge can be awarded to a user only once. If a badge is removed from a user, it can then be awarded to that user again.

Procedure

1. Navigate to **All** > **Community** > **Gamification Data** > **Profile Badges**.
2. Click **New**.
3. Select a **Badge** from the Gamification Badges list.
4. In the **Live Profile** field, add the name of the user.
5. Click **Submit**.
   The badge is assigned to the user and it appears on the community portal.

Remove a badge from a user

Remove a gamification badge from a community user if it is no longer relevant for that user.

Before you begin

Role required: sn_gamification.moderator, sn_gamification.admin

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

Procedure

1. Navigate to **All** > **Community** > **Gamification Data** > **Profile Badges**.
2. Select the **Active** field for the desired user and badge.
3. Change the **Active** field to false.
4. Click **Update**.
   The badge is removed for that user and is no longer visible on the community portal.

Communities references

Reference topics provide additional information about communities.

Important:

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Quick start tests for Communities

Validate that Communities still work after you make any configuration change, such as apply an upgrade or develop an application. Copy and customize these quick start tests to pass when using your instance-specific data.

Important:

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Communities quick start tests require activating the Customer Communities plugin (com.sn_customer_communities) and the Communities Demo Data plugin (com.sn_communities_demo).

Communities: Community test suite

Test	Description	Release version
Post question and validate feed	Verify that a question is posted in the community and validate whether it appears in the content feed.	Madrid
Post video	Verify that a video is posted in the community.	Madrid
Forum membership approval	Verify that a membership request to a forum is approved.	Madrid
Forum membership reject	Verify that a membership request to a forum is rejected.	Madrid
Approve a moderation task	Verify that a moderation task is approved.	Madrid
Reject a moderation task	Verify that a moderation task is rejected.	Madrid
Topic subscription and activity feed validation	Verify that a topic is subscribed to and the topic activities appear in the activity feed.	New York
Approve content approval workflow task on question	Verify the content approval workflow of a question.	New York
Question auto-subscription and activity feed validation	Verify that the author is automatically subscribed to the question and the question activities appear in the activity feed.	New York
Follow a user	Verify that a community user is able to follow another community user.	New York

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Communities: Community test suite (continued)

Test	Description	Release version
Reject content approval workflow task on question	Verify the content approval workflow of a question when content is rejected.	New York
Gamification on video posting	Verify the gamification points gained when posting a video.	New York
Forum subscription and activity feed validation	Verify that a forum is subscribed to and the forum activities appear in the activity feed.	New York
Question subscription and activity feed validation	Verify that a question is subscribed to and the question activities appear in the activity feed.	New York
Post a video with 'Disable comment' option	Verify a video is posted with *`Disable comments`* option as selected.	Orlando
Pin a video as Featured	Verify that a video is marked as featured by community administrator in the forum and community home page.	Orlando

Related topics

Quick start tests

Properties installed with Communities

Community administrators can use properties to configure Communities behavior.

Important:

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The following properties are available for further configuration. To list the properties, enter `sys_properties.list` in the filter navigator and search for the property to configure.

Note: You can also view **Community Properties** and **Forum Properties** from the application navigator. These modules contain a list of the most frequently used properties that you can configure for your community.

Communities properties

Property	Description
sn_communities.adminNoReplyEmail	Email address for community-related notificatior

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Communities properties (continued)

Property	Description
	• Type: string • Default value: communityadmin@servicenow.c
sn_communities.additional_search_sources	List of additional search sources to be included • Type: string • Default value: "community-forums, community
sn_communities.scheduling.allow_authors	Allow or restrict authors to schedule the content • Type: boolean • Default value: Yes
sn_communities.attachments.max_allowed_size	Maximum file size of an attachment in the comm "sn_communities.attachments.max_file_size". • Type: string • Default value: 5 MB
sn_communities.attachments.document.max_allowed_size	Maximum file size of a community document. It w "sn_communities.attachments.document.max_s • Type: string • Default value: 25 MB
sn_communities.blog_count	Number of blogs that a user can post per day. • Type: integer • Default value: 20
sn_communities.content.meta_description	When generating SEO data for an entity, the nun to generate a portion of the SEO <description> ta Typically, the SEO <description> tag for a Comm actual record in the following format: “<forum> - • Type: integer • Default value: 100
sn_communities.content.views.count.limit	Number of views for content pages that are allow sn_communities.content.views.time.limit. • Type: integer • Default value: 50

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Communities properties (continued)

Property	Description
sn_communities.content.views.time.limit	Duration, in seconds, during which a specific nu sn_communities.content.views.count.limit param • Type: integer • Default value: 3600
sn_communities.disable_terms_conditions_role	Comma-separated list of roles that bypass the te
sn_communities.edit_content_explicit_role	Comma-separated list of roles with permission t • Type: string • Default value: n_communities.community_mo
sn_communities.enable_session_cache	Enables or disables session caching. True: The permissions of any non-admin users o access to the various forums and community co community permissions do not take effect until t False: The permissions of any non-admin users • Type: boolean • Default value: false **Note:** Setting this system property to true i session.
sn_communities.enable_topics	Enables or disables topics within a community. If the property is set to false and gamification is • Type: true|false • Default value: true
sn_communities.enable_user_mentions	Enables or disables the user-mentions functiona
sn_communities.glide.script.block.client.globals	Set the value to true to re-enable most of the ina • Type: boolean • Default value: false
sn_communities.implicit_access_mapping	Assign access implicitly to users based on the p • If a user is given forum_admin access, they ca • If a user is given forum moderation rights, they • Type: string

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Communities properties (continued)

Property	Description
	• Default value: {"forum_admin": ["forum_read", "forum_write", ["forum_read", "forum_write", "forum_moderato
sn_communities.instance_base_url	Vanity URL for your instance to be used in email the URL to be different to the instance name. • Type: string • Default value: none
sn_communities.is_content_write_allowed_for_guest_user	Determines whether Content_write access is all False: Content_write access is not given to a pul True: Content_write access is given to a public o • Type: boolean • Default value: false
sn_communities.knowledge_base_id	All questions created in Communities are entere • Type: string • Default value: a4c9fb2e6703220071b89a6617
sn_communities.logging.destination	Location of the log messages. • Type: string • Default value: db
sn_communities.log.verbosity	Code Search log verbosity for the community. Se • 0: Show information that may be useful while warning, and error messages. • 1: Show progress messages as the Code Sear • 2: Show warning which indicates possible une • 3: Show only critical errors which may prevent • Type: choice list • Default value: 1
sn_communities.logging.verbosity	Category for writing log messages: Debug (0), In

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Communities properties (continued)

Property	Description
	• Type: choice list • Default value: 1
sn_communities.max_topic_limit	Maximum number of topics that can be associat five. • Type: integer • Default value: 5
sn_communities.minimum_activity	Minimum number of activities required to make • Type: integer • Default value: 5
sn_communities.portal_default_config	Community portal default configuration. Used in • Type: string • Default value: [{"uiPageMapping":[{"contentTy question-circle","internalName":"question","cor {"contentTypeId":"57f785863b2b220085f76b4 camera","internalName":"video","contentArticle {"contentTypeId":"cc3fcaa0dbd26600b1f6f78 left","internalName":"blog","contentArticle":"a"," {"contentTypeId":"0764c981dbde6600b1f6f78 {"contentTypeId":"8f0a215c6707220071b89a6 circle","internalName":"answer","contentArticle {"contentTypeId":"3f86a8db971232007a97a23 text","internalName":"document","contentArticl {"contentTypeId":"4c3a995ac302320012e45c calendar","internalName":"event","contentArtic
sn_communities.public_forum_user	*sys_id* of the public forum user. Used to calcul • Type: string • Default value: 88ef2155931322005b963511e5
sn_communities.registered_forum_user	*sys_id* of the registered forum user. This value • Type: string • Default value: 5dce996993232200dd773511e
sn_communities.video_count	Number of videos a user can post per day. • Type: integer • Default value: 20
sn_communities.default_permission_for_forum_memberships	Sets the default permission for forum membersh

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Communities properties (continued)

Property	Description
	• Type: string • Default value: ff73ee9893223200a8223511e5
sn_communities.forumListBatchSize	Default number of forums to show on the topics • Type: integer • Default value: 12
sn_communities.topicListBatchSize	Default number of topics to show on the topics li • Type: integer • Default value: 12
sn_communities.disableForumInvitesForExternalEmails	Determines if forum invites from the forum page **Note:** Do not change this value manually b • Type: boolean • Default value: true
sn_communities.attachments.document.max_size	Maximum attachment file size in MB. (1 MB = 102 • string • Default value: 5
sn_communities.attachments.file_extensions	Supported file extensions for community attachr • Type: string • Default value: PPT,PPTX,XLS,XLSX,DOC,DOCX
sn_communities.attachments.max_attachment_count	Maximum number of attachments that can be at • Type: string • Default value: 3
sn_communities.attachments.max_file_size	Maximum attachment file size in MB. The maxim • Type: string • Default value: 2
sn_communities.attachments.max_invalid_attempts	Maximum number of invalid attempts a user can • Type: string • Default value: 3
sn_communities.attachments.max_total_size	Maximum total size (in GB) of attachments. (1 GB

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Communities properties (continued)

Property	Description
	• Type: string • Default value: 500
sn_communities.attachments.total_size	Total size (in KB) of attachments in the communi • Type: string • Default value: 3680.04
sn_communities.attachments.user.day_limit	Maximum number of attachments that can be at • Type: string • Default value: 20
sn_communities.days_to_keep_search_logs	Sets the number of days to keep the search log • Type: integer • Default value: 180
sn_communities.minimum_characters_to_search	Number of characters before a search engine st • Type: integer • Default value: 3
sn_communities.search.blog.enable_acl	Sets how permissions are evaluated for blog typ True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and • Type: boolean • Default value: false
sn_communities.search.discussion.enable_acl	Sets how permissions are evaluated for questio True: Permission is evaluated for that specific co False: Permission is evaluated at forum and con • Type: boolean • Default value: false
sn_communities.search.document.enable_acl	Sets how permissions are evaluated for docume True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and

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Communities properties (continued)

Property	Description
	• Type: boolean • Default value: false
sn_communities.search.event.enable_acl	Sets how permissions are evaluated for event ty True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and • Type: boolean • Default value: false
sn_communities.search.video.enable_acl	Sets how permissions are evaluated for video ty True: Permission is evaluated for that specific co False: Permission is evaluated at the forum and • Type: boolean • Default value: false
sn_communities.user.document_count	Number of documents a user can post per day. • Type: integer • Default value: 20
sn_communities.video_count	Number of videos a user can post per day. • Type: integer • Default value: 20
sn_communities.view_log_sources	JSON string that provides a mapping of view log Log [sn_communities_view_log] table. • Type: string • Default value: {"searchResult": "search_result", "contentFeed
sn_communities.knowledge.enable_harvesting	Enables knowledge harvesting from communitie • Type: string • Default value: true

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Activity Subscription properties

Property	Description
com.snc.actsub.activities.api.fetch.limit	Number of activities in the activity feed. • Type: integer • Default value: 10
com.snc.actsub.activity.rate.count.limit	Number of activities that can be created within a certain time frame. • Type: integer • Default value: 100
com.snc.actsub.activity.rate.time.limit	Duration, in seconds, during which activities can be created. Activities are no longer created after the limit. • Type: integer • Default value: 3600
com.snc.actsub.activity.stream.user.limit	Enter the limit on number of activities stored for a user in the activity feed. The oldest activities are deleted when the limit is reached. • Type: integer • Default value: 2000
com.snc.actsub.core.disable_plugin	Enable (true) or disable (false) the plugin functionality. • Type: boolean • Default value: false
com.snc.actsub.activity.stream.inactive.disabled	Enable pull model for activity feed so that the activity fanouts are disabled and not pushed to the inactive user streams. • Type: boolean • Default value: false **Note:** When disabled, run the Manage Activity fanouts scheduled job for the changes to take immediate effect.
com.snc.actsub.activity.stream.inactive.duration	The duration after which fanouts will be disabled for inactive user streams.

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Activity Subscription properties (continued)

Property	Description
	• Type: integer • Default value: 30
com.snc.actsub.activity.stream.inactive.streams	Enter comma separated stream names which can be considered inactive when not accessed for a certain duration. • Type: string • Default value: default
com.snc.actsub.activity.enable_fanout_config	Enable the property to trigger **Activity Fanouts** based on the configuration at **Activity Type**. Confirm if they are properly configured and then enable the flag. • Type: boolean • Default value: false **Note:** For zboot, this property is enabled by default. You must create this property for upgrade scenarios.

External User Registration properties

Property	Description
sn_ext_usr_reg.allowed_email_domains	Comma-separated list of email domains that can be used to register. By default, the value is empty, indicating that all email domains are allowed. • Type: string • Default value: none
sn_ext_usr_reg.captchaEnabled	Enables Google re-CAPTCHA on the self-registration page. • Type: boolean • Default value: true
sn_ext_usr_reg.eur_user_role	Adds a role when a sys_user record is created through self-registration. • Type: string • Default value: sn_communities.community_user

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External User Registration properties (continued)

Property	Description
sn_ext_usr_reg.Reg_link_expiration_days	Number of days that the registration link remains active. Links which are older than the specified number of days are deactivated and cannot be used for completing the registration process. • Type: integer • Default value: 3
sn_ext_usr_reg.request_count	Maximum number of times a registration link can be requested. • Type: integer • Default value: 3
sn_ext_usr_reg.Temp_user_record_purge_days	Number of days that a registration record is maintained in the User Registration Request [user_registration_request] table. Records older than the specified number of days are deleted. • Type: integer • Default value: 30

Gamification properties

Property	Description
sn_communities.enable_gamification	Enables or disables the gamification feature for the community and controls the appearance of gamification-related widgets on the Community portal. When set to false, no gamification components are displayed. User point totals and badge assignments are not affected. • Type: boolean • Default value: true
sn_communities.content.show_gamification_level	Controls the gamification level that is displayed next to the Community user's name on the Content pages. • Type: choice list • Choices:

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Gamification properties (continued)

Property	Description
	○ **none**: Do not display the user's level ○ **sn_gamification_modules**: Show the user's level in the Community ○ **sn_communities_forum**: Show the user's level for the forum to which the content belongs • Default value: sn_gamification_modules
sn_gamification.days_to_keep_activity_records	Number of days to keep the gamification activity records in the database. Records created or updated prior to the specified number of days are purged. • Type: integer • Default value: 180
sn_gamification.enable_debug_logs	Enables the debug logs for the gamification feature. • Type: boolean • Default value: false
sn_gamification.levels_limit	Maximum number of levels that can be defined for the gamification feature. • Type: integer • Default value: 10

Questions to case properties

Property	Description
sn.communities.enable_csm_case_creation_from_question	This property provides access to the “Create Case” option on the Community Question widget and the “Question to Case” option on the Community header list menu. • Type: true | false • Default value: true

Social Q&A properties

sn_kb_social_qa.max_answers_per_user_daily	Enter the maximum number of times a user can post answers to the Social Q&A questions per day.

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Social Q&A properties (continued)

	• Type: Integer • Default value: 500 • Location: System Properties
Maximum number of Social Q&A comments that can be posted per user per day. sn_kb_social_qa.max_comments_per_user_daily	Enter the maximum number of times a user can post comments to the Social Q&A questions or answers per day. • Type: Integer • Default value: 500 • Location: System Properties
Maximum number of Social Q&A questions that can be posted per user per day. sn_kb_social_qa.max_questions_per_user_daily	Enter the maximum number of times a user can post Social Q&A questions per day. • Type: Integer • Default value: 500 • Location: System Properties

Communities roles

Ensure that users can perform all necessary actions by assigning roles.

Roles

Important:

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Role	Description	Access via
Community administrator [sn_communities.admin]	Administer and manage all sections in the community.	Platform UI
Community moderator [sn_communities.community_moderator]	Moderate content associated with the community.	Platform UI
Forum administrator [sn_communities.forum_admin]	Administer and manage forum permissions content types,	Platform UI

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Roles

Important:

Starting with the Brazil release, Communities is being prepared for future deprecation. It will be hidden and no longer installed on new instances but will continue to be supported. For details, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

(continued)

Role	Description	Access via
	and topics associated to the forum.	
Forum moderator [sn_communities.forum_moderator]	Moderate content within specified forums.	Platform UI
Moderation administrator [sn_communities.moderation_admin]	Administer moderation settings and moderate content associated forums.	Platform UI
Gamification administrator [sn_gamification.admin]	Administer gamification settings and configure gamification rules. Contains the sn_gamification.moderator role.	Platform UI
Gamification moderator [sn_gamification.moderator]	Review and edit the gamification points earned by community users.	Platform UI
Community user [sn_communities.community_user]	Any user who has signed up and accepted the community Terms & Conditions. Their access to forums depends on the permissions set up for each specific forum.	Communities Portal
Knowledge harvester [sn_communities.knowledge_harvester]	A community user who can harvest knowledge articles from a community. Community administrators, and community moderators inherit this role by default. The knowledge harvester role must be granted to other users.	Communities Portal
Proxy case creator [sn_customerservice.proxy_case_creator]	A community user who can create a customer service case from a community discussion.	Communities Portal

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Forum form fields

Set fields on the form to create new forum or sub forum.

Forum form

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Field	Description
Name	Name of the forum.
Description	A short description that defines the forum.
Image	An image that provides a visual reference to describe the forum.
Order	The order that forums are displayed in. By default, the display is alphabetical. Enter a numerical value to set the order that forums are displayed in. You can combine both options.
Parent	The parent forum, if required. This lists the forum as a sub forum of the parent forum.
Enable Membership for this Forum	Check box to make the forum membership only, and enable registered forum users to request to join the forum. If you select this check box, the forum title is visible to all registered community users. Community users must request access to join the forum to see the content. **Note:** The **Approval Workflow for Membership** field appears when you select this check box.
Approval flow for Membership	The workflow for approving new members of a forum. **Note:** The **Approval flow for membership** setting takes precedence over **Approval workflow for membership** if both are set by legacy customers.
Approval Workflow for Membership	The workflow for approving new members of a forum. **Note:** This field is only available for customers who signed up before the Zurich release. If you're a new customer, you won't see this field.
Knowledge Base used for harvesting	The knowledge base used for harvesting community discussions to knowledge articles.

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Related topics

Create a forum

Create a sub forum

Video Configurations form fields

Set fields on the form to configure video sources.

Video Configurations form fields

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Field	Description
Host	A video source website, for example, youtube.com.
Domain	The domain is set to **global** by default.
Application	The application for the video source. It is recommended that you enter `Community`.
Widget	A widget to render the videos from the source. Enter `Communities render video`.

Related topics

Configure video sources for a community

Topic form fields

Set fields on the form to create a new topic.

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Topic form fields

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Field	Description
Name	Name of the topic.
Description	A short description to define what the topic is.
Parent	The parent topic, if required. If you enter a parent topic, the topic is listed as a subtopic of the parent topic.
Image	An image that provides a visual reference that describes the topic.
Knowledge category used for harvesting	The knowledge category used to categorize community discussions harvested to knowledge articles.

Related topics

Create a topic

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